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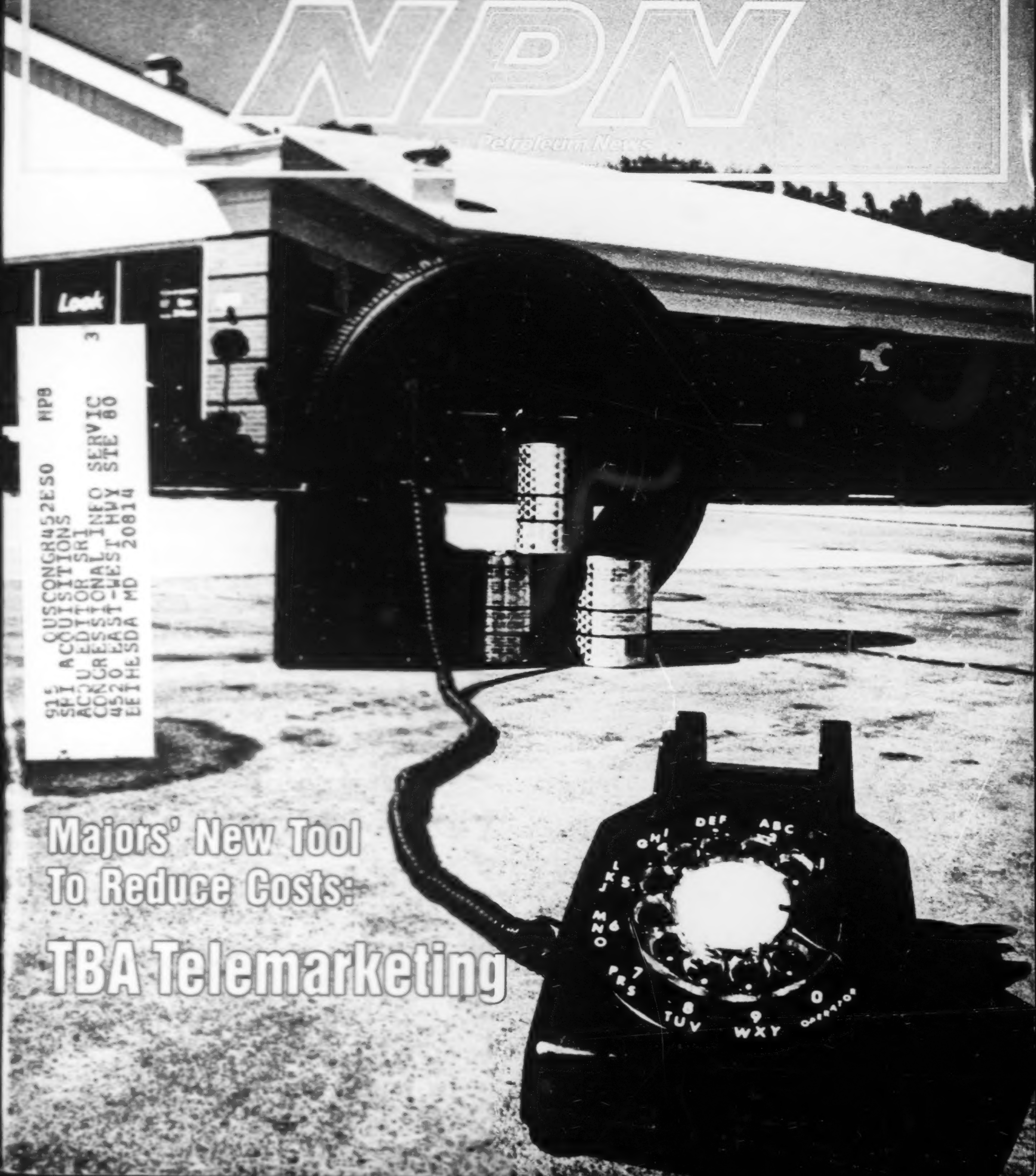
How Gulf Selloff Changes Marketing Map
What 'Bogosian' Case Could Lead To
Why Rockies Jobber Plows Back Profits

NPN

Petroleum News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Majors' New Tool To Reduce Costs:
TBA Telemarketing

NATIONAL PETROLEUM NEWS

NOVEMBER 1984 VOL. 76 NO. 11

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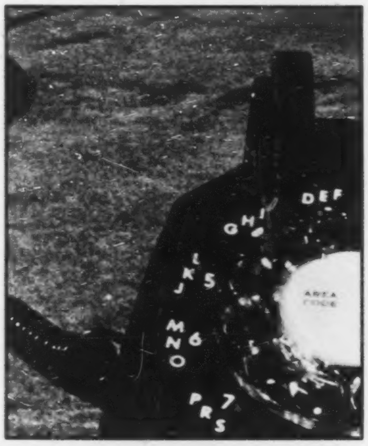
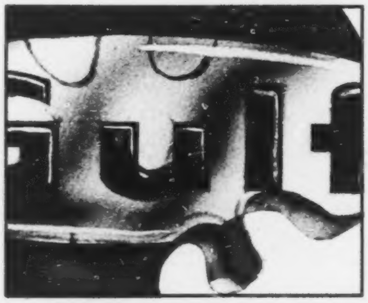


While intense competition in gasoline marketing tends to push aside oil company TBA programs, some majors are turning to telemarketing as an effective way to reduce sales costs and keep TBA sales orders flowing. **Page 40**

Cover photograph by Thomas Olson



Chevron's nearly $1-billion deal with Sohio to sell it 5,660 Gulf outlets in eight southeastern states and a Louisiana refinery will make Sohio a much bigger player and could speed Chevron on its way toward successful coast-to-coast marketing. **Page 29**

George Kimmick's Rockies marketplace is fairly uncompetitive. And, he tries to keep it that way with his C-store/gasoline outlet that far-and-away outshines the other marketers in town. **Page 50**

• TRENDS

PMAA Off to Healthy Start

Four years ago, the National Oil Jobbers Council was a trade association in deep trouble. It was $300,000 in the red, had a rebellion going on over state membership dues and much internal strife. Some people at the time wondered if the group could survive.

Today, however, sporting its new name, Petroleum Marketers Assn. of America, the 44-year-old federation of state associations is functioning about as smoothly as it ever has. It has wiped out its deficit, curbed the rebellion and eliminated much of the internal squabbling.

This was evident in New Orleans when the group held its first convention under its new name. A gigantic trade show and registration of more than 2,000 jobbers and guests reportedly enriched its coffers by $250,000 to $300,000. Meanwhile, potentially explosive issues, which once would have erupted into much debate and bickering, created hardly a ripple. Some members, in fact, said the formal meeting agenda ran so smoothly that the entire affair was boring.

Phillip R. Chisholm, 32, PMAA's executive vice president since May 1981, is given much credit for the turnaround in the group's situation.

Chisholm, the group's chief lobbyist before moving up, took over as chief executive in May 1981, replacing Robert W. Sullivan, who had been fired four months earlier during one of the stormiest periods in the group's history.

Sullivan had been hired a year-and-a-half earlier in hopes that his touted "management expertise" would help the group gain financial strength and internal stability. The results were just the opposite. In addition to plunging the association $300,000 into the red, Sullivan's abrasive personality rubbed many jobber leaders and state association execs the wrong way. In addition, there were charges that he attempted to set policies on his own—policies which sometimes conflicted with state association programs.

It is doubtful that any of his predecessors inherited a bigger mess than Chisholm did when he took over. Or, for that matter, had more apparent handicaps to overcome. In addition to the $300,000 deficit and internal strife, Chisholm was recovering from a serious illness and his incoming president, Henry C. "Hink" Turner, had cancer. Turner died March 30, 1982, three months into his one-year term, and was succeeded by Robert P. McGinley.

Chisholm knew that his major task would be to trim expenses and increase revenues, while attempting to improve relations between the Washington staff and its jobber constituency. Just about everyone says he has done an outstanding job in carrying out this difficult assignment.

Sullivan had an operating budget of about $2.5-million in 1980 when he ran up the $300,000 deficit. He had a 33-person Washington staff.

William Quortrup, president in 1981, and Turner ordered a house cleaning when Chisholm took over. The staff was soon reduced to 17, a reduction of almost 50%, and other cuts were made in office space, projects, travel, etc. By 1982, the operating budget had been slashed to $1.6-million and has remained at about that level since.

Chisholm faced continued squabbling over a new dues formula set in motion during Sullivan's reign. He believes the state associations generally consider this to be an equitable formula now, though, and says there has been an overall reduction of 25% in dues from four years ago.

That $300,000 deficit has been wiped out, and he says PMAA is "getting closer" to a goal of having a surplus in the bank equal to one-half its operating budget.

It is making money off its conventions, trade shows and some special projects. His goal, says Chisholm, is to not depend on membership dues for more than 50% of PMAA's total annual budget.

Equally as important as the strides made to overcome PMAA's past financial problems, though, has been the diplomatic and tactful way that Chisholm has soothed bruised egos and mended fences.

He began his reign by making it clear that the paid Washington staff would carry out policy set by PMAA's jobber executive committee, and would work with and seek advice from state directors and association executives. Most say he has stuck to this promise.

"There is a tremendous contrast between what we had and what we have now," says a key state executive. "Phil's relations with the state executives are good. We know more about budgets and have our own man (Roger Dryer of Ohio) on the financial board. Phil does lots of little things that are important."

At one meeting recently, Chisholm was commenting on the good will that seems to exist now. Elizabeth Walker of Tennessee reportedly responded: "Phil, we haven't changed. NOJC has." *—Marvin Reid*

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

AUGUST	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.184	$1.116	$1.196	$1.355
Regions:				
Northeast	1.191	1.118	1.190	1.343
North Central	1.197	1.143	1.220	1.403
South	1.183	1.110	1.195	1.347
West	1.162	1.088	1.173	1.353

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	9/28/84	9/30/83
Gasoline (total)	228,850	231,090
Gasoline (unleaded)*	105,185	93,501
Jet Kerosine	38,546	34,643
Distillates	142,212	153,833
Residual	47,308	46,790

**Included in gasoline total.*
Source: American Petroleum Institute.

DOE: Economic Surge Lifts '84 Demand, Prices, But '85 Product Picture to Resume Flat Course

Although it isn't filled with gloom and doom by any means, the federal government's short-term energy forecast isn't one that oil marketers will dub "rosey" either.

Issued in September and covering the balance of 1984 and all of 1985, the new forecast says this is what the immediate future looks like:

- The five-year downward trend in total petroleum demand is expected to be reversed in 1984, with total consumption expected to be 4.3% higher than 1983. *But*, no improvement is in prospect for 1985; demand will continue to be about the same as in 1984.
- Gasoline demand is expected to increase 2.4% in 1984, averaging almost 6.8-million b/d. As in total demand, however, the 1985 prospects are flat with consumption in the second and third quarters—the warm weather days—probably below the level of last summer.
- Gasoline prices, with more supply around than can be comfortably accommodated, will continue to be on the soft side. The nominal price (the average for

Washington's Short-Term Energy Forecast

DEMAND

(Thousand bbl. for oil, trillion cf for gas, billion kw for electric)

	1983	% Change '83 vs. '82	1984	% Change '84 vs. '83	1985	% Change '85 vs. '84
Motor Gasoline	6.62	1.2%	6.78	2.4%	6.78	0.0%
No. 2 Heating Oil	2.69	0.7	2.87	6.7	2.79	−2.8
Residual	1.42	−17.4	1.43	0.7	1.37	−4.2
Other Products	4.50	3.0	4.80	6.7	4.93	2.7
Total U.S.	**15.2**	**− 0.5**	**15.9**	**4.3**	**15.9**	**−0.1**
Natural Gas	17.00	− 5.6	18.06	6.2	18.32	1.4
Electricity	2,310.3	3.1	2,438.5	5.5	2,510.4	2.9

PRICES(*)

($ per gal. for oil, $ per mcf for gas, ¢ per kwh for electric)

	1983	% Change '83 vs. '82	1984	% Change '84 vs. '83	1985	% Change '85 vs. '84
Motor Gasoline (**)	$1.22	− 4.7%	$1.20	−1.6%	$1.20	0.0%
No. 2 Heating Oil						
Wholesale	0.82	NA	0.84	2.4	0.84	0.0
Retail	1.08	− 9.2	1.10	1.9	1.11	0.9
Residual (***)	0.65	NA	0.68	4.6	0.67	−1.5
Natural Gas (****)	5.99	15.9	6.08	1.5	6.23	2.5
Electricity (****)	7.18	4.7	7.48	4.2	7.78	4.0

(*)All prices include taxes except No. 2 retail heating oil.
(**)Average for all grades and services.
(***)Average for all grades of sulfur.
(****)Gas and electric prices are for residential consumption.
Source: Energy Information Administration, Short Term Energy Outlook, September 1984.

How It Looks by Quarters

DEMAND (millions b/d)

	History					Projection							
	1983			1984					1985				
	3rd Qtr.	4th Qtr.	Year	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Year	1st Qtr.	2nd Qtr.	3rd Qtr	4th Qtr.	Year
Motor Gasoline	6.81	6.68	6.62	6.34	6.88	7.03	6.84	6.78	6.51	6.88	6.97	6.76	6.78
Leaded	3.05	2.89	2.97	2.69	2.86	2.90	2.77	2.81	2.59	2.69	2.68	2.56	2.63
Unleaded	3.76	3.79	3.65	3.65	4.02	4.13	4.07	3.97	3.92	4.19	4.29	4.20	4.15
No. 2 Heating Oil	2.45	2.95	2.69	3.20	2.79	2.53	2.94	2.87	3.00	2.74	2.52	2.90	2.79
Residual	1.35	1.40	1.42	1.74	1.30	1.33	1.36	1.43	1.62	1.28	1.26	1.34	1.37
Other Products	4.73	4.70	4.50	4.77	4.61	4.89	4.95	4.80	4.89	4.70	5.05	5.07	4.93
Total U.S.	**15.33**	**15.73**	**15.23**	**16.06**	**15.58**	**15.77**	**16.18**	**15.88**	**16.01**	**15.60**	**15.80**	**16.07**	**15.87**

PRICES ($ per gal.)

	3rd Qtr.	4th Qtr.	Year	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Year	1st Qtr.	2nd Qtr.	3rd Qtr	4th Qtr.	Year
Motor Gasoline (*)	$1.27	$1.23	$1.22	$1.20	$1.22	$1.20	$1.20	$1.20	$1.18	$1.19	$1.22	$1.20	$1.20
No. 2 Heating Oil													
Wholesale	0.83	0.82	0.82	0.86	0.83	0.83	0.84	0.84	0.84	0.84	0.85	0.85	0.84
Retail	1.05	1.06	1.08	1.13	1.08	1.06	1.10	1.10	1.11	1.10	1.10	1.12	1.11
Residual (**)	0.67	0.69	0.65	0.69	0.68	0.66	0.68	0.68	0.71	0.65	0.64	0.67	0.67

(*) Average for all grades and services.
(**) Average for all grades of sulfur.
Source: Energy Information Administration, Short-Term Energy Outlook, September 1984.

all grades) will be around $1.20 for 1984, down 2¢ from 1983. The projection for 1985 anticipates $1.18 in the first quarter, $1.22 in the third, and an average of $1.20 for the year.

- Distillate consumption for 1984 will be up about 7%. But that reflects the unexpected cold of the first quarter and increased industrial activity. The forecast for 1985 is that demand will decline about 3% despite modest growth in industrial production. Demand for No. 2 will slip mostly because of oil-to-gas conversions in the home heat market, the government says.
- Distillate wholesale prices will be flat throughout '84 and '85 at about 84¢ gal. Retail prices, which averaged $1.08 in 1983 and $1.10 in 1984, will climb 1¢ in 1985, according to the projections.
- Residual, which has been in a slump for years, will flatten out temporarily in 1984 but will resume the decline in 1985. The 1985 price per gal. is expected to drop 1¢ below 1984's 68¢.

The short-term energy forecast is made twice every year by the Energy Information Administration. The September projection is the one that sums up the current year and gives an overview on the year to come.

The current forecast is predicated on a continuing abundance of crude oil domestically and internationally. It projects an average price of $29 bbl. for imported crude delivered to U.S. refineries—although some prices are already below this benchmark currently.

Three alternative forecasts are made by the EIA—high, low and intermediate "base" projections. The high economic growth forecast assumes that imported crude oil would fall to $25 bbl. and remain at that level throughout 1985. The low economic forecast assumes that imported crude would rise to $33 bbl. and stay there.

The government forecast has these additional qualifiers:

Should the price of imported crude and U.S. economic growth exceed the base case projections:

—For each 1% change in GNP above (or below) forecast levels, oil consumption and imports in 1985 would change 200,000 b/d.

—For each $1 bbl. change in imported crude oil, consumption and imports in 1985 would change 55,000 b/d.

—For each 10% change in heating degree days in the first and fourth quarters, consumption and demand would increase by an average of 270,000 b/d.

—For each 15% change in cooling degree days during the second and third quarters, consumption and imports would change by an average of 25,000 b/d, according to the forecast from the federal agency.

NPRA: Imported Gasoline Influx Real; Some Refiners Seek Fed Restrictions

The surge in imported gasoline perceived by independent refiners, who say the influx has been clobbering them, is no mirage, according to a report by the National Petroleum Refiners Assn.

For the first six months of 1984, imports of leaded and unleaded gasoline rose 67.4%, from nearly 31.2-million bbl. the first six months of 1983 to 52.3-million bbl. the same period this year, NPRA figures show. The U.S. imported 76.2-million bbl. of gasoline all last year.

"Imports are a very big factor in keeping the price of gasoline depressed," notes an NPRA spokesman. Overseas refineries are not subject to taxes as high, and environmental laws as strict as those in the U.S. Thus, product prices in the New York Harbor have been significantly lower than those at regional refineries.

The biggest importer, by a long shot, for first-half 1984 was Apex Oil. Figures available from NPRA for imports of leaded gasoline during that time period indicate the financially troubled company [*NPN*—Sept. '84, p17] imported more than 8-million bbl.—more than double its leaded import volume for the like period in 1983. (See six-month import figures for the top 10 in all PAD districts, except 5 or West Coast, at right.)

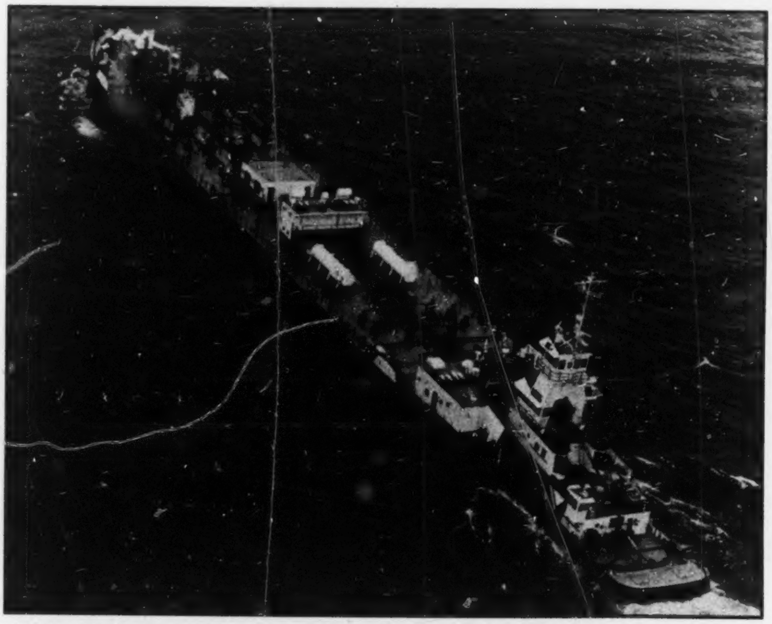
NPRA also claims that shipments coming into New York Harbor and registered as "gasoline blended components" actually might be finished gasoline. "It's difficult to pinpoint what's coming in, but it's quite obvious there's some 'innovation' going on," an NPRA spokesman said. Congress set a 1.25¢ gal. tax on imported finished gasoline, versus a 0.25¢ tax on blending components. For one thing, U.S. Customs Service inspection and manpower is not geared for strict verification of imports.

Another reason NPRA sources say some imports are not "blending components" is that New York City has no refineries and transportation of imported blending components to the nearest plants would be prohibitively expensive.

The association, which represents independent and major refiners alike, has begun pressing for congressional legislation to halt product imports. Many NPRA members who already are counting on imports for profitability or which have international ties feel hamstrung from backing such curbs. But several dozen indies have banded together in a separate coalition to seek such restrictions, citing the increased OPEC refining capacity due to come on-stream.

Leaded Imports

Apex Oil	8,010,511 bbl.
Northville Industries	4,123,332
Phibro Distrib.	1,755,521
Amerada Hess	1,547,236
Will Petroleum	1,506,188
Anshultz Petroleum	1,397,746
Sun Co.	1,332,099
Texaco Inc.	831,024
Kaiser Aluminum	705,259
Unipetrol	670,947



Lightly-taxed, imported 'blending components' are probably finished gasoline says NPRA.

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Will Chevron's New Rent Plan Catch On?
Fuel Oil Outlook: A Delicate Balance
How John Roscoe Gets POS Cash Up Front

NPN

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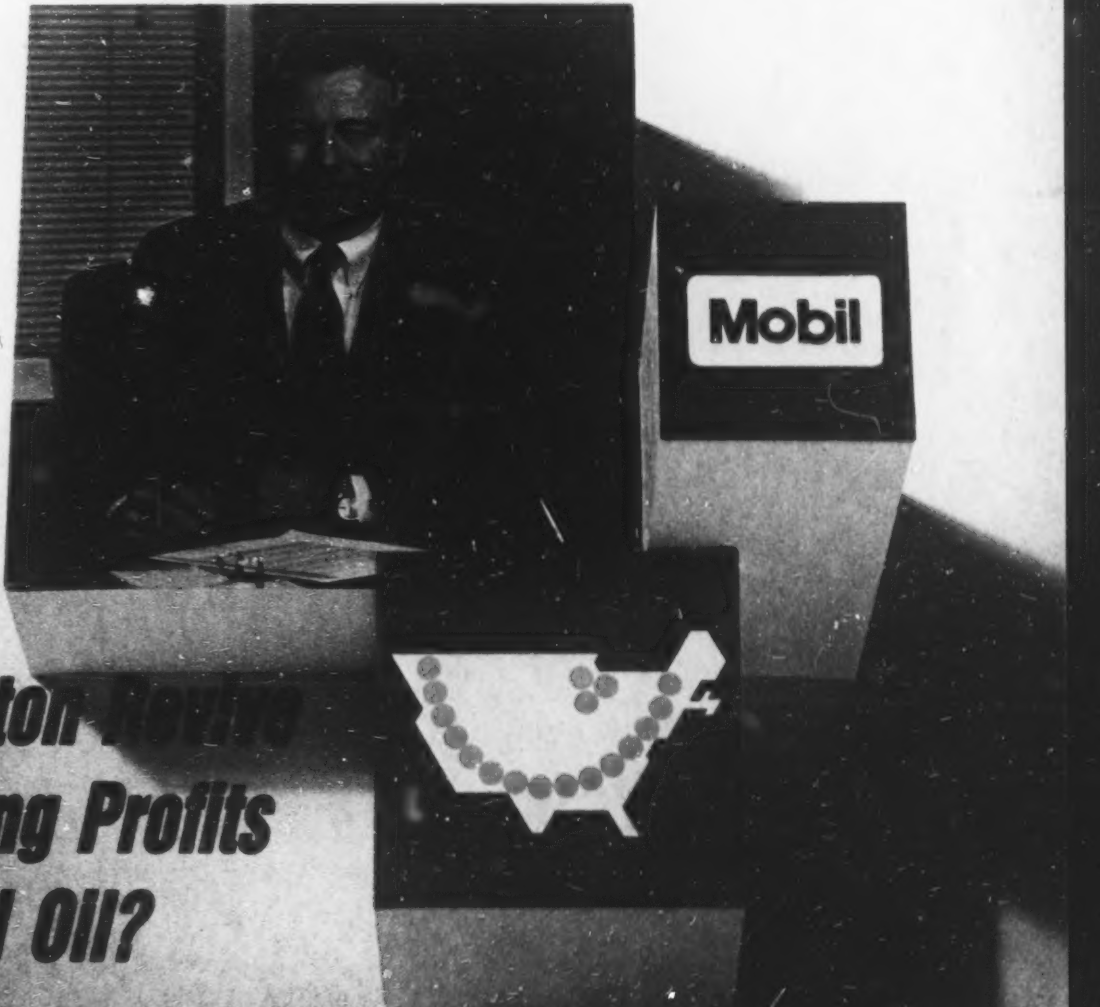

Can Hinton Revive Marketing Profits At Mobil Oil?

NATIONAL PETROLEUM NEWS

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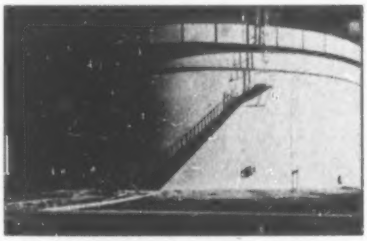
Mobil Oil, under marketing chief Joe B. Hinton, is hunkering down. Its plans for even more consolidation and a new five-year program for $500-million in station construction and face-lifting has the company bullish about its ability to combat its worthy competitors. **Page 40**

Cover by Claude Zajakowski, Chicago



With the abnormal twists of last year's heating season still fresh in their minds, the nation's fuel oil marketers began the 1984-85 heating season with their fingers crossed behind their backs, and are holding tight now as the so-called 'real' cold weather season begins for much of the country. **Page 48**

In one of the most innovative wrinkles yet in electronic payment systems connected to gasoline retailing, a California convenience-store chain plans to convert 115 gasoline facilities to a new 'Cash Card' system that permits cashiers to sell any dollar-and-cent amount of gasoline on a magnetic plastic card. **Page 46**

• TRENDS

Election Outcome Presages Similar, Not Same, Policies

Regardless of your political persuasion, the punch line for the 1984 election is the same: If you've enjoyed the last four years, you're going to love the next four. As the dust from the Reagan stampede and other races clears, it appears the oil industry will lock hands or horns with most of the same faces and policies.

At the same time, no industry or interest group will be immune to helping reduce a massive federal deficit.

When the "new" Congress has been sworn in and the inaugural parade is over, Ronald Reagan's support as president will be a little stronger than it was in 1980. But the hold his Congressional opponents have on the House and Senate will be a little tighter. In the Senate, where Reagan and the Republicans have had a majority, it will be a smaller, more fragile one. In the House, where things have never gone too well for the White House, conservative Republicans failed to regain many of the seats lost in 1982.

Closer to home, the major figures we've been writing about for the past four years—Reps. Bedell, Synar, Tauke, Sharp, Florio, Dingell, etc., Sens. Long, Stafford, etc. and cabinet members Ruckleshaus, Hodel, Dole, etc.—will be with us for awhile longer. Every cause in the industry that had a champion still has one.

Meanwhile, there *is* that massive federal deficit to be cut. For marketers, that means your personal and corporate tax bill won't be affected much, but it's time to watch things like the gasoline excise tax, Social Security tax, and similar special purpose revenue raisers. There is quite a lot of talk on Capitol Hill about a national sales tax, a value-added tax, perhaps a return of excise taxes on tires and motor oil, and conceivably a push mostly by Democrats for reviving the idea of an imported oil fee.

Tax code simplification probably is the biggest single loophole in the "I won't raise taxes" promise. You're tax bracket may be lower if the tax laws are simplified, but there will be fewer ways to deduct expenses and reduce taxable income. One major casualty probably will be interest deductions for businesses as well as individuals.

One environmental issue critical to marketers is the recently passed Resource Conservation and Recovery Act signed by President Reagan two days after the election. [*NPN*—Nov. '84, p16]. Few were guessing how vigorously the administration would enforce the new law or how much funding it would propose toward that enforcement. To be sure, though, key congressional backers of the bill remain on the Hill and ready to prod, if necessary.

Over the next four years, there will be some changes in the agencies. Since most of the independent bodies—most importantly the Federal Trade Commission—are made up of members with seven-year terms, Ronald Reagan will have had the opportunity to nominate all members of those commissions by the time he leaves office in 1988. That doesn't bode well for consumer activists—such as Michael Pertschuk at the FTC—who haven't had much clout but did have a public forum for dissent.

The Supreme Court is another place where the second term Reagan administration will have some clout. By some estimates, there could be four vacancies on the court in the next four years. That, in turn, could have a profound effect on interpretation of the current version of the Petroleum Marketing Practices Act if a substantial case arises, and could play a part in any legal challenge to EPA's accelerated lead phasedown rules, as well.

In Congress, it's a good bet the PMPA amendments will be reintroduced next year—nearly all the bill's co-sponsors will be back in the saddle—but the fate of the measure remains in doubt. First, a few intramural squabbles have marred the unified front that supposedly supports the bill—the Petroleum Marketers Assn. of America, in fact, is said to be reappraising that legislative approach. [See item on page 15.] Second, there's less reason to believe that the White House will be willing to compromise its "less government" ethic than there was this year.

The issue to watch may well be the EPA lead phasedown. The stage is set for a conclusive test of whether the Reagan administration will wield its election mandate or put it on a shelf somewhere to admire but not use. There's no doubt the phasedown will cause some economic mischief, and a case could be made that EPA is being hasty. (DOE, in fact, has made that argument already [*NPN*—Nov. '84, p16].) It can also be argued that if the government doesn't interfere, lead additives will fade away eventually as more vehicles are equipped with catalytic converters. Without the worry of re-election, will the White House give its unflagging support to EPA? The first clue may come in January, when the White House version of the fiscal 1985 budget is unveiled.

—Thomas Goldsmith

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

SEPTEMBER	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.189	$1.120	$1.203	$1.360
Regions:				
Northeast	1.193	1.120	1.192	1.343
North Central	1.200	1.146	1.224	1.404
South	1.183	1.108	1.199	1.351
West	1.178	1.104	1.191	1.368

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	11/2/84	11/4/83
Gasoline (total)	230,120	224,781
Gasoline (unleaded)*	108,981	93,639
Jet Kerosine	40,283	37,267
Distillates	155,116	161,550
Residual	51,169	47,527

**Included in gasoline total.*
Source: American Petroleum Institute.

Chevron/Gulf Deal OK'd, As Gulf Southeast Price Surfaces as 'Bargain'

Two big pieces of the Chevron/Gulf merger fell into place at the end of October when the federal government gave its final approval to the $13.3-billion deal and Standard Oil of Ohio put into writing its agreement with Chevron to buy Gulf's downstream assets in the Southeast.

Many industry observers were surprised at how low the Chevron purchase was ($690-million), as announced by Sohio [*NPN*—Nov. '84, p29]. When the company agreed in late September to purchase the package—5,660 retail outlets, 29 product terminals, the 200,000-b/d Alliance, La., refinery, a lube plant and a coke plant—Chevron chairman George M. Keller described the deal as being "a little less than $1-billion"—the figure Chevron reportedly discussed with potential buyers earlier.

The Federal Trade Commission had ordered Chevron to divest some 4,200 stations in six southeastern states as a condition to FTC approval of the merger. Like any sale of Gulf assets by Chevron, the Sohio purchase is subject to commission approval.

The FTC in late October, indeed, gave the final go-ahead for the Chevron/Gulf takeover, restating that Chevron must operate Gulf's oil and gas assets independently until the government-mandated divestitures are completed. The crucial federal hurdle was cleared less than eight months after Gulf's board of directors voted to accept Chevron's bid [*NPN*—April '84, p20].

In addition, Chevron also must divest Gulf's 51% interest in the West Texas pipeline and its 17% interest in the Colonial pipeline, deals the company had not completed by early last month.

The FTC, as part of its final approval of the largest merger in U.S. corporate history, said it will closely watch the divestiture process and may require further spin-offs of Gulf assets if the commission believes it necessary.

Majors' Third-Quarter Profits Shrink, Reflecting 'Quite Lousy' Pump Prices

Retail gasoline prices, which oil companies politely said were "highly competitive" but which analysts generally agreed were "quite lousy," were blamed for the many minus signs in this fall's crop of third-quarter and nine-month earnings reports.

Exxon, Amoco, Phillips and Diamond Shamrock were the only ones on the plus side. Union of California just about held its own with a less than 1% differential between this year and last.

For the first nine months of '84, about half of the top score of companies were still doing better than 1983, among them Exxon, Amoco, Shell, Phillips and Union.

Chevron, which acquired Gulf in June, said its equity amounted to $217-million in the third quarter, but after deduction of acquisition financing costs of $210-million the amount added to the company's third-quarter net was only $7-million. In like vein, Texaco said its equity in Getty, which it acquired earlier in the year, was $123-million in the third quarter and $273-million for the first nine months of 1984. It did not give further details.

U.S. Steel said Marathon Oil, which it bought two years ago, had after-tax earnings of $184-million in the third quarter, versus $238-million in the comparable period last year. Conoco, owned by Du Pont, was reported to have earned $21-million in refining, marketing and transportation in the third quarter, down 72% from last year's $74-million.

Arco and Ashland accounted for their big decreases by reporting heavy write-downs on selected assets.

Southland Corp., though not an oil company but nevertheless the nation's biggest independent gasoline marketer, said its C-stores did OK but its Citgo Petroleum Corp. division lost ground because of depressed gasoline prices. Southland was off 5.3% for the quarter but up 27.3% for the nine-month period.

Third-Quarter and Nine-Month Earnings

(Add $000)

Company	3rd Qtr. 1984	3rd Qtr. 1983	% Chng.	9 Mos. 1984	9 Mos. 1983	% Chng.
Exxon	$1,275.0	$1,225.0	4.1%	$4,100.0	$3,360.0	22.0%
Mobil	238.0	404.0	(41.1)	984.0	1,060.0	(7.2)
Texaco	235.0	331.0	(29.0)	858.0	977.0	(12.2)
Stand. of Ind.	600.0	584.0	2.7	1,718.0	1,409.0	21.9
Chevron	342.0	509.0	(32.8)	1,100.0	1,187.0	(7.3)
Atlan. Richfield	(519.0)	405.0	—	282.0	1,130.0	(75.0)
Shell	447.0	449.0	—	1,190.0	1,080.0	10.2
Gulf (a)	—	—	—	—	—	—
Tenneco	126.0	159.0	(20.8)	501.0	475.0	5.5
Stand. of Ohio	359.0	435.0	(17.5)	1,198.0	1,188.0	—
Phillips	217.0	176.0	23.3	641.0	474.0	35.2
Sun	122.0	167.0	(26.9)	402.0	392.0	2.3
Getty (b)	—	—	—	—	—	—
Union of Calif.	181.2	180.2	—	547.0	447.9	22.1
Amerada Hess	40.6	75.1	(45.9)	174.4	148.3	17.6
Dia. Shamrock	61.6	39.7	55.2	185.4	73.9	150.9
Ashland (c)	(240.9)	51.1	—	(172.5)	102.8	—
Kerr-McGee	21.6	39.7	(45.6)	99.7	101.3	(1.6)
Pennzoil	59.0	36.0	63.9	80.0	107.0	(25.2)
Murphy	25.3	39.8	(36.4)	75.2	108.0	(30.4)
Amer. Petrofina	1.8	23.0	—	27.8	32.0	(13.1)
Southland Corp.	56.9	60.1	(5.3)	129.6	101.8	27.3
Quaker State	8.8	9.3	(5.4)	21.4	27.5	(22.2)

(a) Included in Chevron report; (b) Included in Texaco report; (c) Fourth quarter and full year, fiscal ends 9/30.

Roscoe Changes Name Of His 'Shortstop' Chain

John Roscoe's 125 California convenience stores have been known since the beginning as "Shortstop," a name that many marketers consider catchy and appropriate. But now, Roscoe has changed the name to "Food and Liquor Store."

"We have liquor now in all but four stores and will soon have it in all our stores," he says. "We don't want to be thought of as a convenience store. We want to start getting the planned purchase rather than the drop-in purchase."

Roscoe also changed the name of his company. He says, "We decided the purpose of the company was to get and keep customers, so we're calling it, 'The Customer Co.' I want to be a place where people buy things. I want some volume. I'm tired of being poor."

Rock Island Grabs Lead With 95-Octane Unld. At a 'Gloves Off' Price

Rock Island Refining has taken a commanding lead from every major supplier in the cross-country octane race with a premium unleaded "clocked" at 95.

Although the Indianapolis-based independent got off to somewhat of a slow start, its ethanol-blended product well exceeds the rating of its nearest competitor, Sun's 93.5-octane Ultra. But field reports say Rock Island is undercutting other majors' premium unleaded pump prices by as much as 10¢ gal.

Rock Island introduced the product in several of its home turf stations last July—months after Sun's Ultra and Amoco's 93-octane unleaded debuted in different markets. But since then, sales have been "going pretty well," according to a company spokesman, and marketing has expanded throughout Rock Island's eastern Great Lakes market place.

The company has 250 outlets in Indiana, Michigan and Ohio selling under the Golden Imperial, United, Colonial, Tulsa and Progressive brands. The product comes from Rock Island's 42,500-b/d Indianapolis refinery, which ran at roughly 75% of capacity nearing November.

The 10% ethanol/90% premium unleaded blend receives a 2.5% sales tax break in Indiana, a 3.5¢ gal. exemption in Ohio and a 4¢ gal break in Michigan. The latter, however, will shrink to 1¢ gal. on Jan. 1

The company also sells an 89-octane regular leaded and 87-octane regular unleaded product. Prior to July, Rock Island's premium unleaded measured at 91.5 octane.

"We were the last ones to be selling a high-octane unleaded product in this market. So, in a way, we were catching up," said a company spokesman. As of early November, Rock Island's only promotion had been point-of-sale pump toppers and driveway banners. "Until we see how sales progress, we aren't planning much in the way of promotion."

Maybe it doesn't need to. Subsidiary Wake-Up Oil, Indianapolis, has witnessed premium's volume through its 41 stations double from 5% to 10% of its gasoline sales, says Dave Hogshire.

Wake-Up prices roughly "a penny under the majors" on regular leaded, he says, with a 6¢ to 7¢ spread between it and unleaded regular and 5¢ to 6¢ between that and its unleaded premium. Hogshire said that at the end of October, his $1.23 gal. premium unleaded price for the 95-octane product was beating the Amoco 93-octane and Shell 92-octane SU 2000 prices by 10¢.

Latest Station Count 21.4% Below 1977; Fuel Oil Dealer Population Falls 17.5%

Preliminary and incomplete returns from the U.S. Census Bureau's 1982 nose count of service stations and fuel oil dealers confirm the common wisdom that the population total is down but sales dollars are up—triple what they were only 10 years ago.

The initial reports, which are only now emerging from the government's distribution offices after innumerable delays, deal only with those businesses that have paid employees. Automatically excluded at this time, therefore, are the very small independents and the "mom and pop" establishments which have no formal payroll operations.

Full reports for the entire industry, which then would include the little places —of which there aren't nearly as many as there used to be—will not be available until sometime next summer, the Census Bureau says.

The bureau must complete 50 state profiles for all retail businesses before the expanded data can be totaled up. Only about six state profiles have been completed so far, so it looks like June or July before the last one comes out.

Since at least 80% of the service stations and 70% of the fuel oil dealerships have payrolls, the preliminary Census Bureau figures do offer a reasonable picture of what took place between 1982 and 1977. [For 1977 Census Bureau detail, see *NPN Factbooks 1980, 1981* and *1982*.]

Meantime, here are some of the highlights of the preliminary findings:

Service Stations

- In 1982, there were 116,154 service stations with payrolls, a decrease of 21.4% from 1977's total of 147,618 and a drop of 36.7% from the peak total of 183,385 in 1972.
- Total sales for service stations with payrolls in 1982 were $94.8-billion, compared with $53.9-billion in 1977 and $31.4-billion in 1972. Average sales per station were $816,000, with Nevada and Alaska topping them all at $1.2-million each. Mississippi was the lowest, with $577,000 per station.
- The number of paid employees in 1982 was 604,286, versus 673,130 in 1977 and 747,668 in 1972. Station payrolls totaled $4.8-billion in 1982, exactly $1-billion more than in 1977 and not quite $2-billion more than in 1972.

Service stations, as counted by the census people, are those establishments which generate 50% or more of their dollars from gasoline and oil products. Not taken into consideration in this and other Census Bureau data then, are the thousands of convenience stores, chain stores, garages and other business places.

About a year ago, *Lundberg Letter* estimated the total retail outlet population at 210,000 [*NPN*—Sept. '83, p12]. It's fair to assume that this total is closer to 200,000 now, in view of the continuing attrition in the service station industry.

Mathematical averages and ratios are simply educated guesses, but when the 21.4% service station decrease is applied to the 1977 universe of 177,560 stations, the "missing" 1982 total could well be 139,562. The *NPN 1984 Factbook*, using other estimates and calculations, offers a 1982 estimate of 144,690.

Fuel Oil Dealers

- There were 6,077 retail fuel oil establishments in 1982—down moderately from 1977's total of 7,368, 1972's total of 7,276, and 1967's peak of 7,763.
- Sales in 1982 were $11.9-billion, not quite double 1977's total of $6.6-billion and 1972's peak of $3.0-billion.
- Payrolls totaled $833.8-million in 1982, versus $630.3-million in 1977 and $438.3-million in 1972. Dealers employed 53,152 in 1982, 57,847 in 1977, and 56,605 in 1972.

Census statistics on the fuel oil business are not as extensive as those in the gasoline sector. In 1977, for the first time, the Census Bureau estimated the total fuel oil dealer population at 10,672. They had a total sales volume of $6.9-billion. As in the case of the gasoline business, data on the fuel oil universe will not be available until sometime next summer, when the state-by-state reports are completed.

LPG Dealerships

In still another preliminary report, the Census Bureau said there were 5,919 liquefied petroleum gas dealers with payrolls in 1982, down slightly from 1977's total of 6,477 and 1972's total of 6,466. The summary said 1982 sales were $4.8-billion, versus $2.9-billion in 1977 and $1.4-billion in 1972.

Average sales per dealership were $811,000 in 1982 compared with $455,000 in 1977. New Jersey had the highest average ($1.4-million) in 1982, while Hawaii was the lowest with $136,000. Payrolls in 1982 totaled $543-million for 39,186 employees; $373-million in 1972 for 39,646 employees; and $265-million in 1972 for 40,880 employees.

Texas led all the other states in 1982 with a payroll of $41-million for 3,078 employees.

Census Bureau Data—Service Stations/1982-1977[a]

	Establishments with payrolls		Sales		Annual payroll		Paid employees
	1982	1977	1982 ($1,000)	% change 1977 to 1982	1982 ($1,000)	% change 1977 to 1982	1982
United States	**116,154**	**147,618**	**$94,832,469**	**75.9**	**$4,769,073**	**24.4**	**604,286**
Alabama	2,001	2,631	1,172,677	62.2	54,846	11.6	7,626
Alaska	176	167	205,901	109.6	15,690	45.4	1,220
Arizona	1,204	1,535	1,306,398	102.1	62,277	39.2	7,544
Arkansas	1,216	1,631	766,587	79.3	40,955	25.4	5,339
California	10,624	13,215	10,521,934	86.9	517,631	36.5	64,733
Colorado	1,570	2,119	1,429,634	110.1	70,850	31.9	9,404
Connecticut	1,726	2,017	1,446,166	82.6	84,330	39.6	9,957
Delaware	300	394	265,531	69.0	11,783	17.9	1,571
District of Columbia	158	242	180,038	30.9	10,124	−15.5	1,137
Florida	5,504	6,363	4,778,928	107.4	243,650	54.4	29,419
Georgia	3,077	4,011	2,382,709	89.4	115,615	29.7	14,838
Hawaii	367	382	406,064	134.6	28,830	55.9	3,706
Idaho	494	661	352,934	69.4	16,753	25.3	2,408
Illinois	5,132	6,781	4,590,544	56.1	234,275	3.8	28,256
Indiana	3,167	4,143	2,726,474	66.7	129,531	10.4	16,302
Iowa	2,064	2,781	1,374,662	54.0	72,267	7.2	9,512
Kansas	1,511	2,033	1,067,528	70.1	57,614	21.5	7,118
Kentucky	2,119	2,753	1,553,143	61.7	74,706	11.6	9,688
Louisiana	1,972	2,417	1,534,832	89.2	77,925	37.5	10,479
Maine	640	767	385,238	65.3	20,894	29.2	2,909
Maryland	1,877	2,249	1,999,672	68.1	111,816	22.3	13,801
Massachusetts	2,962	3,468	2,318,222	85.2	116,424	27.3	16,662
Michigan	4,130	5,684	3,992,341	59.1	172,141	6.7	22,045
Minnesota	2,228	2,801	2,044,267	78.4	103,413	25.6	13,296
Mississippi	1,191	1,557	686,888	64.7	36,261	31.8	4,902
Missouri	2,944	4,041	2,228,484	57.6	117,632	10.9	14,608
Montana	528	752	399,439	60.4	22,171	17.6	2,923
Nebraska	1,129	1,426	743,218	49.0	39,232	1.8	5,206
Nevada	476	582	564,273	94.3	31,843	51.5	3,592
New Hampshire	547	637	399,472	70.3	20,215	25.8	2,692
New Jersey	4,157	4,597	3,154,818	83.5	162,251	32.2	20,117
New Mexico	780	1,067	645,949	88.4	32,993	26.7	4,248
New York	6,328	7,973	4,404,389	53.7	238,695	12.5	28,003
North Carolina	3,049	4,085	1,896,100	56.4	91,469	15.1	11,545
North Dakota	422	540	362,675	91.3	21,528	36.4	2,650
Ohio	5,904	7,800	5,303,649	75.5	236,688	8.3	30,714
Oklahoma	1,599	2,306	1,138,925	93.5	61,394	44.1	7,963
Oregon	1,492	1,852	1,107,522	78.0	58,710	30.9	7,598
Pennsylvania	5,781	7,253	4,275,721	58.3	208,024	14.5	29,618
Rhode Island	515	610	370,096	77.1	17,648	31.9	2,352
South Carolina	1,666	2,267	1,198,102	81.5	55,875	26.8	7,635
South Dakota	533	666	356,755	58.9	17,190	7.4	2,343
Tennessee	2,490	3,305	1,957,688	81.7	92,960	23.5	11,607
Texas	8,213	10,384	6,574,282	101.3	342,696	48.8	41,777
Utah	842	993	657,296	86.6	31,218	33.6	4,392
Vermont	359	455	217,379	64.1	12,339	35.5	1,731
Virginia	2,652	3,371	2,460,271	72.1	127,107	21.4	15,510
Washington	2,146	2,669	1,697,039	84.5	86,391	36.2	10,569
West Virginia	1,061	1,343	709,115	57.1	35,544	19.8	4,617
Wisconsin	2,701	3,304	2,109,613	77.3	103,871	27.1	13,929
Wyoming	430	538	398,618	95.4	22,842	49.0	2,475

[a] Preliminary report for establishments with payrolls; data for universe will not be available until summer 1985.
Source: U.S. Census Bureau, 1982 Census of Wholesale Trade, Preliminary Report.

Census Bureau Data—Fuel Oil Dealers/1982-1977[a]

	Establishments with payrolls		Sales		Annual payroll		Paid employees
	1982	1977	1982 ($1,000)	% change 1977 to 1982	1982 ($1,000)	% change 1977 to 1982	1982
United States	6,077	7,368	$11,937,189	80.2	$833,825	32.3	53,152
Alabama	7	12	6,602	94.4	330	−3.2	33
Alaska	39	45	91,459	(D)	6,080	(D)	270
Arizona	6	5	728	6.0	75	−22.7	7
Arkansas	7	10	12,755	267.2	467	94.6	39
California	24	31	19,362	169.2	1,267	72.1	113
Colorado	9	13	4,584	5.9	237	−41.6	23
Connecticut	365	408	803,357	102.7	63,272	51.9	3,489
Delaware	51	63	106,702	93.8	6,196	14.0	440
District of Columbia	10	10	75,995	(D)	4,957	(D)	280
Florida	130	158	106,472	69.4	8,462	21.2	839
Georgia	16	20	21,736	202.4	1,065	72.3	106
Hawaii	1	3	(D)	(D)	(D)	(D)	(D)
Idaho	12	23	4,991	−47.7	365	−50.1	56
Illinois	89	150	144,773	6.5	6,300	−45.5	398
Indiana	89	122	117,856	15.5	6,383	−14.7	492
Iowa	48	61	45,232	50.6	2,797	15.4	199
Kansas	20	23	14,873	95.2	1,015	25.8	88
Kentucky	31	33	22,223	116.5	1,332	62.8	117
Louisiana	9	15	8,586	88.5	566	22.8	48
Maine	201	235	357,388	71.3	21,679	24.4	1,702
Maryland	130	152	367,717	110.5	25,371	44.8	1,696
Massachusetts	778	870	1,324,084	87.1	100,356	39.2	6,353
Michigan	131	199	183,896	35.6	10,705	1.1	1,023
Minnesota	96	125	145,753	(D)	7,773	(D)	656
Mississippi	9	12	2,616	94.8	201	54.6	28
Missouri	41	57	31,658	37.5	1,567	−.3	167
Montana	8	7	2,482	(D)	189	(D)	17
Nebraska	16	18	13,482	(D)	654	(D)	75
Nevada	7	7	16,038	106.4	1,476	53.3	76
New Hampshire	140	169	246,321	109.6	20,579	70.8	1,491
New Jersey	531	629	1,197,062	68.4	91,763	29.4	5,309
New Mexico	1	4	(D)	(D)	(D)	(D)	(D)
New York	997	1,272	2,833,396	78.0	206,540	34.3	11,007
North Carolina	259	336	250,658	40.5	15,605	9.3	1,327
North Dakota	32	28	36,348	183.3	1,729	84.7	143
Ohio	130	146	157,122	89.2	8,203	33.0	609
Oklahoma	17	19	4,578	51.8	385	40.0	35
Oregon	61	98	129,341	43.7	9,537	−5.1	658
Pennsylvania	599	659	1,410,330	88.3	92,224	36.9	6,276
Rhode Island	151	174	247,866	95.3	18,809	31.2	1,260
South Carolina	82	101	81,310	69.6	4,248	19.3	399
South Dakota	25	24	17,788	(D)	1,066	(D)	110
Tennessee	15	18	16,577	50.5	758	−7.0	79
Texas	50	61	68,509	84.2	3,323	5.7	244
Utah	11	6	31,283	(D)	1,256	(D)	97
Vermont	92	107	139,509	62.5	10,375	25.2	752
Virginia	211	250	505,425	127.3	32,560	47.8	2,433
Washington	118	195	215,233	75.7	17,716	19.4	937
West Virginia	14	13	16,719	167.3	868	.5	70
Wisconsin	158	167	280,685	98.7	14,904	38.6	1,062
Wyoming	3	5	2,308	(D)	123	(D)	13

(a) Preliminary report for establishments with payrolls; data for universe will not be available until summer 1985; (D) Data withheld by Census Bureau to avoid disclosing data for individual companies.
Source: U.S. Census Bureau, 1982 Census of Wholesale Trade, Preliminary Report.

Sello
96 9
104 9
self
serve

Secondary brands, Mobil's response to the indie onslaught, are branding back up.

have to have is the best configuration to make a profit."

Mobil isn't ready to embrace the C-store route, as have many other major marketers. It's more comfortable with its snack shop approach, which is roughly 500 square feet of space in which customers can buy sandwiches, hot foods, milk, bread, cigarettes and similar low-scale, fast turn-over items. Attractive signage urges motorists to stop in for all sorts of tasty specials and even such non-edible commercial items as "oil to go," either by the can or by the carton.

Properly operated service bays are good profit centers too, Hinton says, and "we're trying to stay with a high level of these at the Mobil stations so people can get everything they need."

Jobber Legacy

Hinton was visibly enthusiastic about Mobil's "partnership" with its jobbers.

"We have always been in favor of them," he said. "We have more than 1,800 jobbers now, of whom it's safe to say at least 1,200 have been with us for more than 10 years. It used to be that jobbers handled about 18% of our business. Today it's almost twice that—35% to be a bit more specific."

Mobil used to have a lot more jobbers than it has today. *NPN Factbooks* show that the total was around 3,000 jobbers and commission agents in 1972. Now, as Hinton noted, the total is around 1,800.

There are good reasons for this change in numbers, Hinton said. "First, Mobil did withdraw from the Rockies and the Plains states and we lost some jobbers there, naturally. There were a certain number of switches in other markets too, like West Texas and New Mexico. Probably the main reason, however, is the changing face of the jobber industry itself. There have been all sorts of buyouts and mergers through the years—we're all aware of those things—and where maybe there used to be three distributors, there's only one who's three times his former size."

The big point, said Hinton, is that there are fewer of them but they are handling twice as much product as in 1972 when the population was 1,000 more.

Hinton said Mobil is actively looking around for jobber business today. "We believe there are opportunities available for both of us," he said.

In discussing relationships, the marketing executive said the company holds two distributor meetings a year, at which any distributor can ask any question he wants to. Said Hinton with a grin: "We can stand the questions, if they can stand the answers."

One of his goals is to find some sort of a solution to the problems that often crop up between the commercial and the distributor sides of the business. "I'm not sure how it can be done, but we want to eliminate the conflict that exists," he said.

Mobil is not alone in having conflicts between the commercial and distributor segments of the marketing business as both go after big volume accounts. Distributors generally go right up the wall when big accounts sometimes are taken away by the commercial departments with price commitments they cannot afford to match.

Hinton stressed that distributors will have to seek the same high levels of efficiency that it and other oil companies are shooting for constantly.

"The rewards go to those who are the most efficient," he said, "and that applies upstairs and downstairs. We've all got to use the modern technologies that are available . . . the computers and the electronic equipment . . . and recognize that industry is no longer people-intensive."

To illustrate his point, he turned around from his desk to face a computer terminal and screen. "It used to be that marketing executives like myself had to wait several days to get sales figures for stations, regions, classes of trade and so on. All I have to do now is ask the right questions, punch the right keys and I have it all in front of me in a matter of seconds. Just about anything I want to know, including prices, trends and futures markets; anything and everything, just like that."

Again that grin: "It's a new world, a new technology. No more green eye shades and hand-made reports." **NPN**

Another Pickens Raid?

Rumors were flying in mid-November that T. Boone Pickens Jr., the Texan who forced Gulf Oil to merge with Chevron, might be preparing an unfriendly takeover of Mobil or one of three other oil companies—Sun Union or Phillips.

Neither Pickens nor Mobil management would say much about the rumors.

Wall Street sources claim that the Mesa Petroleum chairman has lined up the type of legal and financial talent necessary for a large corporate takeover attempt. There was speculation, also, that Pickens might be putting together basically the same team of financial backers that took part in his attempted takeover at Gulf.

Trading in Mobil stock in November was about double what it was earlier in the year.

Where Mobil Stands In Today's Marketplace

In terms of assets:

Exxon	$69.9-billion
Mobil	35.2-billion
Texaco*	27.2-billion
Amoco	25.8-billion
Chevron*	24.1-billion

**The Texaco and Chevron positions may be revised when their acquisitions of Getty and Gulf, respectively, and mandated spinoffs are completed.*

In 1983 gasoline gallonage:

Amoco	7.3-billion gal.
Shell	7.1-billion gal.
Exxon	7.0-billion gal.
Texaco	5.9-billion gal.
Mobil	5.8-billion gal.

By national shares:

Amoco	7.23%
Shell	6.97
Exxon	6.90
Texaco	5.80
Mobil	5.69

By 1983 service station totals:

Exxon	18,707
Texaco	18,692
Amoco	17,800
Mobil*	15,403
Gulf	15,103

**Includes Sello, Reelo, Hi-Val, Big-Bi and Lo-Lo secondary brands.*

By branded jobbers (1983):

Amoco	1,923
Mobil	1,803
Phillips	1,751
Total Petro.	1,380
Texaco	1,176

By sales and earnings (1983):

	Net Sales	Earnings
Exxon	1	1
Mobil	2	7
Texaco	3	8
Amoco	4	2
Chevron	5	4

conference at Alexandria, Va., an event which drew a SRO audience and generated considerable excitement and enthusiasm [*NPN*—Oct. '84, p62].

In mid-September, PMAA and the Department of Energy collaborated on an all-day research and development seminar in Washington—the first time in 15 years that the fuel oil industry has had an opportunity to see or do anything about such an important facet of its basic business.

More than 100 fuel oil marketers, including a representative from Canada, several equipment manufacturers and industry associations participated in the seminar, whose prime purpose was to update the industry on government research in oil heat equipment. At the same time, it gave the government an indication of the industry's interest in continuation of the programs underway or projected.

There is no question that the seminar was a resounding success. The intensity of the questions and discussions in the post-presentation periods convinced the government participants that the oil heat industry indeed was exceedingly interested in all of its R & D.

One result is that the government plans to hold another seminar next spring or summer. It will be designed to attract a much larger audience and participation by marketers and equipment manufacturers and, hopefully, refiners. Only one refiner representative had planned to attend the September meeting but even he did not check in for the proceedings.

The first seminar was heavily technical in nature and was intended primarily to update the heating oil industry on the various programs it has been running at its Brookhaven National Laboratory, Long Island, N.Y., in recent years.

Covered were such subjects as fuels and combustion, condensing heating systems, low-firing rate systems, and retrofit technology.

Dugald Stewart, Griffin-Galbraith Fuel Co., Tacoma, Wash., and chairman of PMAA's heating oil committee, presided over the sessions, which ran all day in DOE's Forrestal building auditorium. Originally scheduled for a much smaller room, the meeting site was switched to accommodate the overflow of fuel oil marketers and industry people.

A. J. Streb, a DOE deputy director, welcomed the group and "all the help, knowledge and advice you can give us."

Robert Lynch, executive vice president of Empire State Petroleum Assn., and long a leader in oil heat promotion, chided refiners for their lack of support in industry affairs.

"When you have suppliers who take no responsibility to promote a product, no responsibility to conserve it, no responsibility for research, and basically no interest in it, you set it up as a punching bag . . . which is essentially what has happened to heating oil."

Nevertheless, he said, "This meeting is recognition that we're not going out of business. It is a big start. Next year will be even bigger and better."

Heating Oil's Rough Road To Continue, Study Says

Uncompromisingly tough, a new study by the Petroleum Industry Research Foundation projects a gloomy future for oil heat in the space-heating markets.

Using Department of Commerce data for the 10-year period of 1974-1983, the research organization noted in its October report that electricity and natural gas are continuing to gain shares in the housing markets, while oil heat's share continues to erode.

This is true, the study states, in both new construction and in the basic inventory of all single-family homes.

It said that in the Northeast, almost half of the homes are still heated with oil, "but oil heat has shown a steady decline since 1974. . . . Gas heat is likely to become the predominant heating fuel in the near future in this region, having reached 42% of all homes in 1981."

Nationwide, oil heat still keeps 15-million home owners comfortable and happy, according to the study.

The study mentioned that electricity has regularly accounted for about half of the total heating installations in new single-family homes, but it also pointed out that the biggest hunk of the construction is taking place in the South where heating requirements are low and the negative aspects of higher fuel costs are offset by the lower capital cost of equipment and the short seasonal usage.

Share of Market—New Single-Family Homes

		Units Completed (000)	Gas (%)	Electricity (%)	Oil (%)	Other (%)
U.S.	1974	940	41	49	9	1
	1978	1,369	37	52	8	3
	1983	921	44	49	2	6
Northeast	1974	132	29	39	32	0
	1978	141	16	34	43	8
	1983	106	38	36	17	8
North Central	1974	220	51	36	12	1
	1978	300	50	36	11	4
	1983	140	66	25	0	9
South	1974	397	27	67	4	1
	1978	571	27	69	3	2
	1983	475	35	62	0	3
West	1974	191	66	33	0	0
	1978	357	52	45	0	3
	1983	200	53	40	0	8

Source: Petroleum Industry Research Foundation/U.S. Department of Commerce.

Share of Market—All Single Family Homes

	Units (000)	Gas (%)	Electricity (%)	Oil (%)	Other (%)
U.S.					
1974	70,346	62	12	24	2
1978	76,570	61	16	21	2
1981	82,586	61	19	18	3
Northeast					
1974	16,277	37	4	57	2
1978	16,944	38	6	55	2
1981	17,840	42	7	48	3
North Central					
1974	18,983	77	5	17	1
1978	20,159	77	8	14	1
1981	21,558	77	10	11	2
South					
1974	22,315	60	21	16	3
1978	24,895	57	26	13	3
1981	27,248	55	30	11	4
West					
1974	12,769	75	16	7	1
1978	14,571	72	21	5	2
1981	15,940	70	24	4	3

Source: Petroleum Industry Research Foundation/U.S. Department of Commerce.

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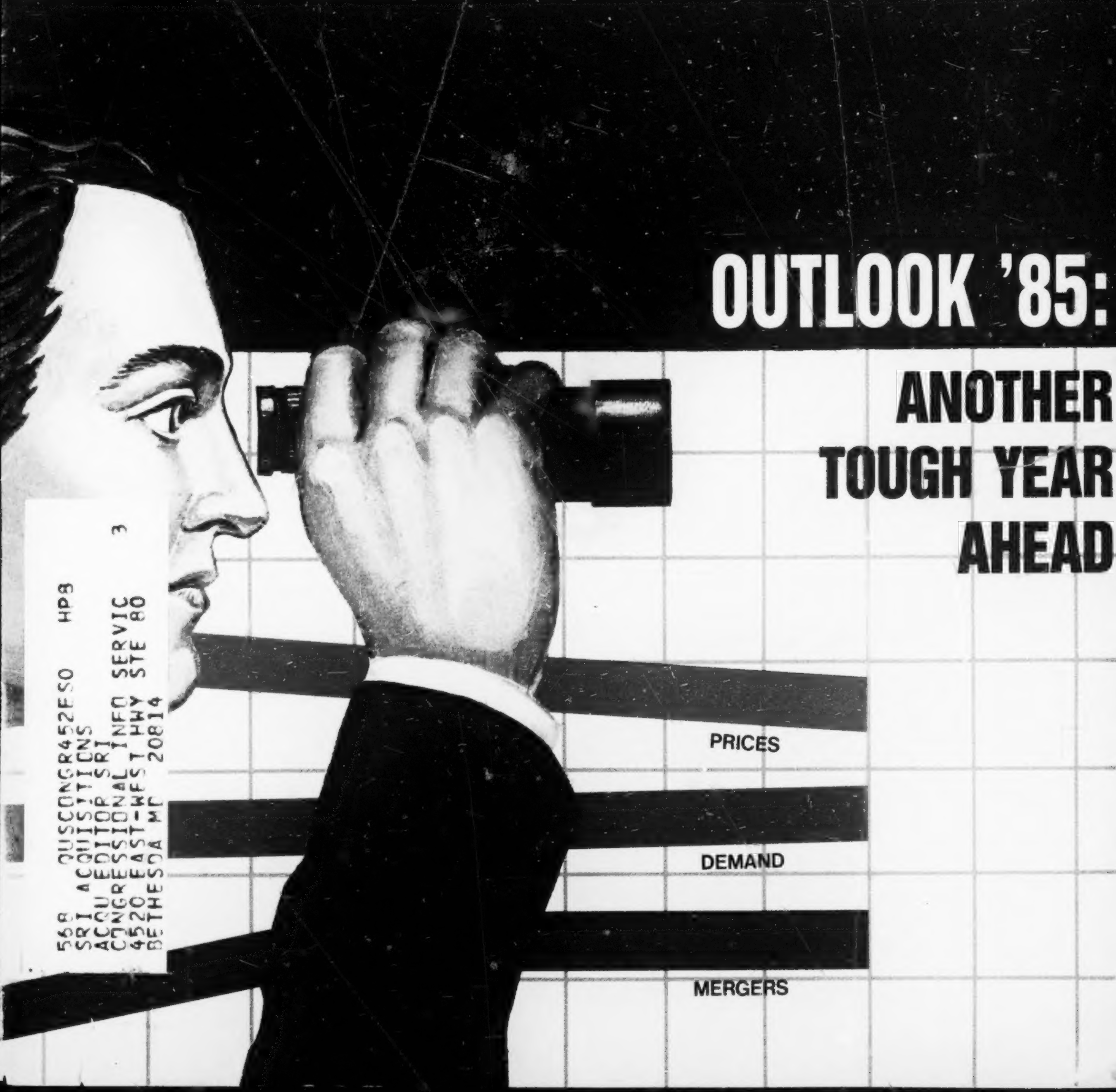
January 1985 $4.50

Shell Jobber Bets $36-Million on Stores
How Video Rental Shows Jobber Profit
Phillips Fight: One-Brand Jobber at Risk?

NPN
National Petroleum News



OUTLOOK '85:
ANOTHER TOUGH YEAR AHEAD

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4520 EAST-WEST HWY STE 80
BETHESDA MD 20814

NATIONAL PETROLEUM NEWS

JANUARY 1985 VOL. 77 NO. 1

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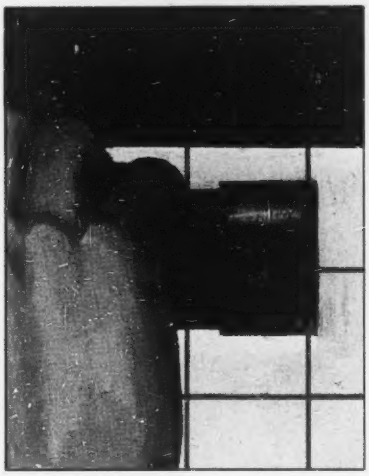


With too much of everything on tap or readily available—crude, products, refineries, storage capacity and transport included—it's no wonder many oil marketers are looking at 1985 with some apprehension. They sense—probably correctly—that this year will be as demanding as the one just past. **Page 34**

Cover art by Anne Feiza, Chicago

Slim retail gasoline margins haven't daunted Texas jobber Kelly Broach's ambitious plans for expansion. In fact, $36-million says the multi-brand jobber can make a go of another 90 pumper/C-stores 10 years from now. **Page 42**

VIDEO RENTALS

An Exxon jobber in Reno has found a retail tie-in which he expects will provide profits of at least $48,000 a year at some of his 10 C-store outlets. It's the video cassette movie business. **Page 48**

• TRENDS

Pickens/Phillips Struggle Imperils One-Brand Jobbers

As yet another big and bloody takeover battle began taking shape last month, oil marketers—and especially traditional-type branded jobbers—had to begin wondering just how they will fit into an industry undergoing its most dramatic restructuring of all time.

Can the traditional concept of "brand loyalty" between oil companies and jobbers survive the restructuring?

This key question was being raised after T. Boone Pickens Jr., the corporate raider who earlier helped push companies like Cities Service and Gulf Oil on the road to virtual oblivion, announced that his new "takeover" target was Phillips Petroleum Co.

Pickens, chairman of Mesa Petroleum Co., Amarillo, Texas, said Mesa and Wagner & Brown, a West Texas-based oil and gas company, had formed a partnership for the purpose of gaining control of Phillips.

This would be accomplished with an initial tender offer for 15 million shares of Phillips' stock at $60 a share, with this offer perhaps later extended for up to 23 million shares. The Mesa group's intention was to acquire up to 20.6% of Phillips' stock and replace Phillips' 16 directors with four of its own, according to information filed with the Securities and Exchange Commission.

Many marketers and financial analysts, however, suspected that Pickens was trying to set in motion a replay of last year's struggle for Gulf Oil which eventually forced Gulf into a merger with Chevron.

Phillips' first official reaction was to obtain a temporary restraining order to block the Mesa group's tender offer, claiming it violated an agreement between Mesa and General American Oil prohibiting such takeover attempts. Phillips acquired General American in 1983 after Mesa had dropped a hostile takeover of that company.

The defensive legal moves then were reinforced by Phillips assembling a $5-billion line of credit. Observers late last month believed the company might buy back half its shares for about $70 each to pacify Phillips shareholders attracted by Mesa partners' $60 offer. Some speculated Phillips might apply the money in a leveraged buyout to take the company private.

With these several legal and financial maneuverings swinging back and forth in late December, other observers felt Phillips quickly might acquire a second-tier oil company or even launch a counter-offensive bid for Mesa Petroleum. Still others wondered if Phillips had a "white knight" awaiting just over the next hill.

Whatever the eventual outcome, some marketers see this latest takeover attempt as more bad news for their segment of the industry. As one trade association executive put it: "The dinosaurs are mating again. Even the most efficient marketer can be adversely affected. Nobody knows what the outcome will be."

The announcement that Pickens had chosen Phillips as his next target had branded jobbers, in particular, nervous and concerned.

Phillips, said Petroleum Marketers Assn. of America immediate past-president Jack Griffith, has long supplied "hundreds of independent marketers." Pickens, he noted, starts takeover attempts but rarely completes them. He raises "legitimate questions" about oil company management and profits when he starts his takeover campaigns, said Griffith, but the end result has been the target companies merging with other large companies.

Griffith and Phillip Chisholm, PMAA's executive vice president, express concern that "jobber-oriented" companies are being gobbled up in the mergers by companies which may lean more toward non-jobber marketing. If Phillips is driven into a merger with another major which, say, favors direct-retail operations, the results could be catastrophic for jobbers.

Phillips, as both Griffith and Chisholm point out, is the most "jobber-oriented" marketer of all the majors. It depends on its network of branded jobbers to move 90% or more of the products turned out by its three refineries. Although ranked about eighth among the majors in total assets, Phillips' 1,751 branded gasoline and fuel oil jobbers as of Jan. 1, 1984, was second only to Amoco's 1,923, according to the *NPN Factbook*.

With Phillips under seige, while Gulf and Getty are being absorbed by Chevron and Texaco, Griffith has this observation about branded jobbers trying to carry on the tradition of representing only one company and one brand:

"The biggest damn fool in the industry today," he says, "is the branded jobber who has all his eggs in one basket."

—Marvin Reid

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

OCTOBER	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.196	$1.127	$1.209	$1.365
Regions:				
Northeast	1.192	1.114	1.190	1.337
North Central	1.202	1.148	1.225	1.406
South	1.182	1.105	1.197	1.351
West	1.211	1.135	1.224	1.405

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	11/30/84	12/2/83
Gasoline (total)	243,133	236,697
Gasoline (unleaded)*	111,761	99,899
Jet Kerosine	39,129	36,722
Distillates	160,707	165,581
Residual	50,721	53,876

**Included in gasoline total.*
Source: American Petroleum Institute.

that the attendant couldn't see the misfueling," he says. "We're all for the Clean Air Act but we just can't be responsible for people breaking the law," says Schade. He adds he's afraid the misfueling law could apply to his unattended cardlock facilities as well.

Richard Kozlowski, EPA's director of field operations, declined comment while the case was still pending. Because the EPA conducts about 20,000 such investigations each year—600 in November alone, Kozlowski said he didn't have first-hand knowledge of the Gem case.

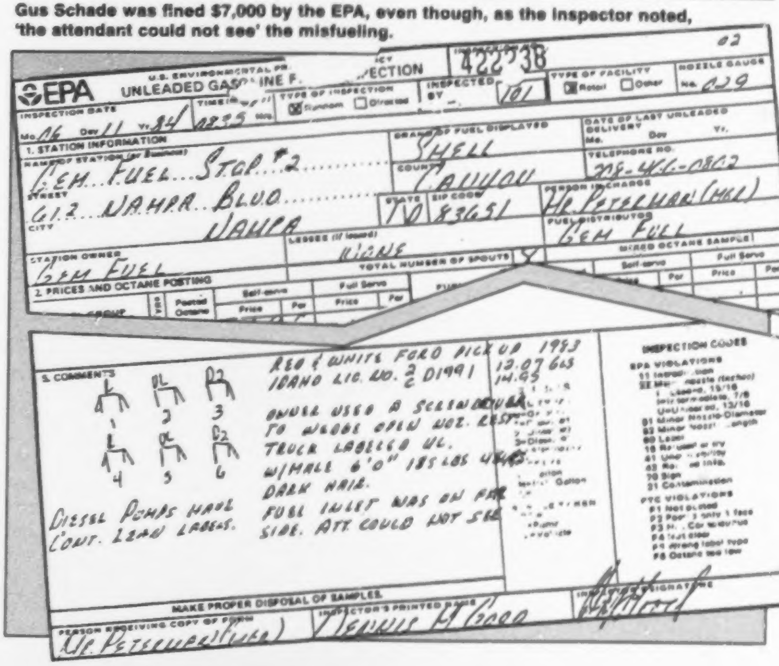
Schade says after his attorney wrote a letter to Western division EPA attorney Judith A. Graham, the agency informed him that it may take the matter to court. After a notice of violation is sent, the accused has 90 days to discuss the charges with EPA and settle the fine, says Kozlowski. After that period, he says, EPA may conduct a discovery search of a marketer's records for evidence of further violations.

He adds, however, that if a marketer makes an effort to correct a problem or takes steps to make another violation less likely, fines may reduced by as much as 40%.

Meanwhile, Senator Symms has indicated in a letter to Schade that he is in "total sympathy" with the marketer over the difficulties of policing motorists, calling the citation "outrageous."

"It's not just the money," contends Schade. "What if we had inspectors at all of our outlets? It's not likely, but if inspectors saw violations at all of my 28 stations, they could shut us down for good."

Gus Schade was fined $7,000 by the EPA, even though, as the inspector noted, 'the attendant could not see' the misfueling.



U.S. ENVIRONMENTAL PR... ...CY
EPA UNLEADED GAS...INE F... ...ECTION
422738
02
INSPECTION DATE Mo. 06 Day 11 Yr. 84
TIME 0835 hrs.
TYPE OF INSPECTION ☒ Random ☐ Directed
INSPECTED BY 101
TYPE OF FACILITY ☒ Retail ☐ Other
NOZZLE GAUGE No. 029
DATE OF LAST UNLEADED DELIVERY Mo. Day Yr.
1. STATION INFORMATION
NAME OF STATION (or Business) GEM FUEL STOP #2
BRAND OF FUEL DISPLAYED SHELL
TELEPHONE NO. 208-466-0802
STREET 612 NAMPA BLVD
COUNTY CANYON
CITY NAMPA
STATE ID
ZIP CODE 83651
PERSON IN CHARGE Mr. Peterman (Mgr)
FUEL DISTRIBUTOR GEM FUEL
LESSEE (if leased) NONE
STATION OWNER GEM FUEL
TOTAL NUMBER OF SPOUTS
MIXED OCTANE SAMPLE Self-serve Price Per Full Serve Price Per
2. PRICES AND OCTANE POSTING Posted Octane Self-serve Price Per Full Serve Price Per
5. COMMENTS
L UL R2 1 2 3
L UL D2 4 5 6
RED & WHITE FORD PICK UP 1983
IDAHO LIC. NO. 2/C D1991
12.07 GLS
14.95
OWNER USED A SCREWDRIVER TO WEDGE OPEN NOZ. REST. TRUCK LABELED UL. W/MALE 6'0" 185 LBS W/ DARK HAIR.
FUEL INLET WAS ON FAR SIDE. ATT. COULD NOT SEE
DIESEL PUMPS HAVE CONT. LEAD LABELS.
INSPECTION CODES
EPA VIOLATIONS
01 Minor Nozzle-Diameter
02 Minor Nozzle Length
60 Label
70 Sign
21 Contamination
FTC VIOLATIONS
F1 Not posted
F2 Posted only 1 face
F6 Octane too low
MAKE PROPER DISPOSAL OF SAMPLES.
PERSON RECEIVING COPY OF FORM Mr. Peterman (Mgr)
INSPECTOR'S PRINTED NAME Dennis H. Good
INSPECTOR'S SIGNATURE

Utah jobber purchases Conoco's lube facility

A Utah Conoco jobber is planning to expand his customer base with the transfer of a North Salt Lake City lube oil distribution center from Conoco to his firm.

Mike Eades, president of Olympus Oil, Salt Lake City, says that his firm will continue to supply some 70% of the state's jobbers as it has for seven years. Another company spokesman says that Olympus has now started to supply jobberships in Wyoming and Nevada as well.

Olympus has leased half of the facility for warehouse space since 1977. So, when Conoco decided that the distribution facility was surplus for the company, Olympus was it's logical choice to buy it.

Several competing Conoco jobbers have expressed dissatisfaction, although Conoco says that most area jobbers favor the move and points out that it still offers product directly at its Ponca City, Okla., terminal.

Eades says that he believes that most of the complaints have come from two jobberships, one in Salt Lake City, the other outside of the metropolitan area. "We're not looking to compete with them, but if they're not moving product, we can."

By J. Richard Shaner

EAST COAST

Interest Fades in Atlantic Waters As Possible Source of Oil or Gas

It might sound strange to characterize the Atlantic Ocean as nothing more than one big dry hole but that's the way it's going to be until someone gets real lucky with a drill bit off the East Coast—if ever.

Shell, the last of the oil companies that have been trying since 1978 to find some oil or gas in the Atlantic's continental shelf waters, gave up in early November. Its ninth consecutive dry hole was another multi-million-dollar disaster [*NPN*—Sept. '84, p22].

The industry has drilled a total of 40 holes in the Atlantic, from the midlands off the New Jersey coast to the fishing banks off New England. All but five were dusters. The others had some showings of oil or gas but not in sufficient quantities to warrant development of the strike.

It has been an expensive adventure—more than $2-billion in lease costs and roughly another billion or so in drilling and related costs.

If, as the oil companies often say, they only net 2¢ to 3¢ gal. in terms of gasoline, think how many gallons would have to be sold to generate that much capital for investment—maybe a billion to a billion-and-a-half gallons!

Oil companies began their Atlantic operation in 1978 with their first penetrations in the Baltimore Canyon about 100 miles southeast of Atlantic City, N.J.

Twenty-eight dry holes later, they shifted their attention northward to the Georges Bank off New England. Here again, eight holes in the sea floor turned up nothing of interest.

Shell, in conjunction with several partners, initiated another deep water shot in the dark in August 1983 in the Wilmington Canyon, pledging itself to drill three to five wells in record-breaking depths at estimated costs of $30-million to $40-million each.

One by one, they wound up as nothing more than holes in the ground.

Shell did set two depth records, however. Its first well was in 6,800 feet of water, and its third in 6,952 feet. All four wells went down to the 16,000- to 17,000-ft. levels before abandonment.

Here's an informal boxscore of the Atlantic operations:

	No. of holes	Est. Costs (millions of $)
Baltimore Canyon:		
Exxon	7	$116.9
Texaco	5	71.1
Tenneco	3	33.0
Mobil	3	30.0
Shell	3	25.2
Gulf	2	19.8
Houston Oil & Minerals	2	15.5
Murphy	1	13.0
Conoco	1	4.0
Georges Bank:		
Shell	2	61.0
Mobil	2	49.0
Exxon	2	27.0
Tenneco	1	25.0
Conoco	1	17.5
Wilmington Canyon:		
Shell	4	107.0

There's still another Atlantic Ocean frontier to be explored. That's off the coast of Georgia and Florida. It was never considered the hottest of prospects, so don't be too surprised if that one is really slow getting off the ground.

To the North, there have been big strikes in the Atlantic southeast of Newfoundland. The Hibernian field up there has yet to be fully dimensioned, it's that big.

The U.S. Geologic Service still thinks there are billions of barrels of oil and trillions of cubic feet of gas in the Atlantic waters off the U.S. coast. All someone has to be is lucky—very, very lucky—to find it, in the face of what has happened so far.

Ultramar expands with Augsbury annexation

Ultramar Canada Ltd., which penetrated the Northeast's fuel oil market with its surprise purchase of Pittston Petroleum [*NPN*—May '84, p27], has expanded its U.S. horizons with the acquisition of Augsbury Corp., of Ogdensburg, N.Y. [*NPN*—Dec. '84, p17].

Where Pittston and Augsbury are concerned, they're not in the same ballpark, naturally. Pittston was a $100-million affair, Augsbury $6.3-million. But Augsbury has been an independent in northern New York for 127 years, and within hours of the approval of the acquisition by the federal court's bankruptcy division, the name had been changed to Ultramar, Northern Division. New letterheads containing the notation, "formerly The Augsbury Corp.," were ready to handle the announcement.

The buyout included most of Augsbury's 20,000 fuel oil accounts, gasoline stations (44) and convenience stores, as well as its bulk plants and terminals. Augsbury normally handles about 100-million gal. a year, mostly in the Plattsburgh, Massena, Lake Placid, Saranac Lake, Brewerton, Oswego and Syracuse areas.

Ultramar, headquartered in Don Mills, Ontario, just outside of Toronto, is a fully integrated company operating on a global basis. Its U.S. headquarters are in Pittston Petroleum's old set-up in Montvale, N.J.

Florida court kills ban on ethanol imports

Florida's State Supreme Court has overturned a new state law that would have excluded foreign-made ethanol from benefiting from the 4¢ gal. gasohol tax break.

The ban was aimed primarily at Brazilian imports which had been flowing into the state. The decision by the high court was unanimous. It came down quickly—little more than a week after both sides had presented their oral arguments.

The tax break declines to 2¢ gal. in July of next year.

Time runs out on Pa. below-cost bill

It's back to the drawing board for the retailers in Pennsylvania fighting for the past several years to get either a divorcement or a below-cost selling bill in the Commonwealth.

Their last chance went down the drain in late November when the state legislature adjourned and all pending bills and proposals died with it [*NPN*—Nov. '84, p15].

Dealers will have to start from square one again in a brand new legislature which convenes early this month.

Both the House and the Senate lopsidedly approved a divorcement bill in 1984, but it was so plastered with amendments that it went to a conference committee, which, after months of inaction, finally came up with a completely re-done substitute that focused on below-cost selling only.

Here again, the House and the Senate lovingly endorsed the compromise and sent it along to the governor. He surprised one and all by vetoing the measure with a strong message that called it anti-consumer and not balanced in its implementation.

That's when time began to run out.

The Legislature, in recess at the time, couldn't get another crack at it or an override possibility until after Nov. 19. Then, the calendar, the Thanksgiving Holiday weekend and the absolute lack of desire on the part of the legislators to become embroiled in a bitter override fight in the waning minutes of the legislative session were a bit too much.

Proponents signaled the governor that they would like to offer a compromise if he would accept an override, but he and his lieutenants and legislative lobbyists turned on all the pressure they could to stave off any further action.

Hess adds N.J. units to mystery store total

Now that it has made the plunge, Amerada Hess apparently thinks that its minimart C-stores are the real thing.

In its third-quarter report, the company says it has added several more units in New Jersey to the ones it has in Pennsylvania, New York, South Carolina, Georgia and Florida.

Hess, which rarely, if ever, tells anyone anything more than it absolutely has to, would not say how many C-stores it now has in operation.

The third-quarter report indicated the independent is tinkering around with electronic debit systems at some of its stations. It says a number of stations have been modernized and rebuilt and some have data collection systems transmitting sales and other data to the corporation's control center.

NEFI saluted by feds for energy innovations

New England Fuel Institute has been given a National Energy Award for the many conservation programs and innovations it has come up with in recent years.

NEFI was recommended for the award by Massachusetts governor Michael Dukakis, who gave the Institute the state's "Technology Transfer '80's Award" in late October. NEFI was one of six winners in a field of 1,000 competitors.

company officials consider flying both flags at retail outlets for a while as motorists become accustomed to Chevron's presence.

GOWMA's Frost believes advertising is the better route, though neither Sohio nor Chevron have indicated plans for media campaigns.

Observers note that Chevron has been less specific than Sohio in outlining its plans for the Gulf properties. One expert believes that the lack of information can be attributed to "the company's obligation to continue operating Gulf as a separate unit until final FTC approval" of the merger.

The observer also says that Gulf personnel do not seem to know anything about Chevron's future plans for the Gulf jobbers or for Gulf marketing personnel.

A Chevron spokeswoman says that the company will "continue to enjoy Gulf's brand recognition during an undetermined transitional period," with the eventual phasing out of the Gulf brand in favor of Chevron. She says that the company will continue to honor Gulf credit cards but that all credit card processing will now be done at Chevron's Concord, Calif., processing center. Gulf's card transactions had been processed at the company's credit card center in Atlanta.

Though not legally binding, the spokeswoman adds that Chevron has promised not to use Gulf's credit card customer lists to solicit cardholders for Chevron. She says that no specific time period has been tacked onto the promise.

Chevron in early December said that it had "no further plans" to divest more of the Gulf properties which include several foreign crude oil trading companies and a fleet of 10 mobile rigs. The company expected by this month to close the sale of Gulf's 17% interest in the Colonial Pipeline system and a 51% interest in the West Texas Gulf Pipeline, as ordered by FTC.

Chevron has announced its plans for other personnel and for Gulf's Pittsburgh headquarters. In late November, the company said that it was offering voluntary severance, with up to a full-year's salary, for some 12,000 employees nationwide. It also announced the transfer of 5,800 jobs from Houston and various other locations to Chevron headquarters in San Francisco and the closing of Gulf's corporate headquarters in Pittsburgh.

The company announced that Gulf's eight marketing districts and two lube oil regions will merge with nine Chevron divisions to form 11 marketing divisions by April. The divisions will be: San Ramon and La Habra, Calif., Denver, Dallas, Houston, Atlanta, Baltimore, Perth Amboy, N.J., and Plantation, Fla. The lube oil regions will be based in Chicago and Los Angeles. *—Tim Grace*

Slide in Station Count Ebbing; Survivors Start to Get Fitter

While it's too early to be downright optimistic, fresh figures from the federal government indicate the precipitous decline in the U.S. service station population may be bottoming out.

The good news is contained in the 1983-1985 franchising report which the Bureau of Industrial Economics of the Department of Commerce will release later this month.

The study says the 1984 population decline wasn't nearly as great as had been forecasted. It also says that the 1985 population decline will be the lowest one-year decrease since the big slide began way back in the hectic, oil-short days of 1973.

The 1984 population is estimated at 132,080 service stations. The 1985 projection is 130,000.

To put these figures into perspective, it should be noted that last January's population forecast for the year just ended was 130,000 and specified that at least 6,500 retail outlets would vanish from the highways and byways during the 12-month period.

'Only' 4,500 stations disappeared in 1984—2,000 less than expected, leaving 132,080.

Instead, the revised estimate for the 1984 population is 132,080 stations—meaning that only 4,500 or so stations had disappeared, 2,000 fewer than expected.

It also moved back by one full year the projection that the service station population would fall to around 130,000—that won't happen until year-end 1985.

The franchising study itself makes no projections on the possible bottoming out of the population slump. It sticks to its statistical knitting with drab tables and factual recitations. But industry observers were quick to note that the slow-down in the population decline may signal the end.

There's a building and rebuilding program going on now as majors and independents alike fight for diminishing market shares. Although some analysts had said in the past, while everything was going downhill at a breathtaking pace, that the service station population could possibly drop as low as 100,000, most observers felt that 125,000 to 130,000 was a more likely figure. And, that's where it appears to be heading in 1985.

Not quite 2,100 stations are expected to be closed down in 1985. That's the lowest one-year total since 1976, when only 2,640 were boarded up. The biggest one-year loss was 1974 when 19,750 stations went out of business.

What this all means, however, is that the service station world has shrunk from 226,459 stations in 1972 to 132,080 in 1984, a drop of 94,379 or 41.7%. If the 1985 figure of 130,000 proves to be correct, the new total would be a drop of 96,459 stations and 42.6%.

That there are fewer stations does not mean the marketing industry will be unable to handle the increased volume of passenger cars and other vehiclar traffic. Many of the stations are being replaced by 100,000 to 200,000 gal./month pumpers, and some companies are building in the 300,000-plus gal. range.

Thus the years-long shakeout, while causing many casualties among independents, particularly "mom and pop" locations of 30,000 gal./month or so, is having a positive effect on the survivors.

This is borne out by the fact that gross income for the 130,000 service stations is expected to rise to $111-billion in 1985, up 4% over 1984's $107-billion.

The Bureau of Industrial Economics' figures, like those of the U.S. Census Bureau, only involve those service stations that generate 50% or more of their income from the sale of gasoline and oil products. So, it does not take retail pumps at convenience stores and other locations into consideration.

The census bureau definitions are so limited that they prompted the American Petroleum Institute to petition the government in November to broaden its base so that the marketing industry could get a better handle on its statistical profile.

But API's petition was limited too. It suggested classifications that would indicate totals for conventional stations, pumpers and convenience stores, while retaining the 50%-and-above proviso for service stations.

This prompted newsletter publisher Dan Lundberg to write an open letter to the government and the industry suggesting a real overhaul that would be something better than a "lamentable perpetuation of an antiquated methodology."

He said neither API's fine-tuning nor anything else so far is addressing itself to the basic shortcomings—the lack of an urgently needed full accounting of the nation's gasoline system.

The proposals couldn't have been more opportune in light of the errors that took place in the 1982 census and only recently came to light: a blooper that will deprive the industry of having a full universe count of the retail stations. [See related story on page 34.]

Is the Long Downhill Slide Over at Last?

Year	Population	Vs. Preceding Year	% Chng.
1985*	130,000	−2,080	−1.6%
1984*	132,080	−4,490	−3.3
1983	136,570	−8,120	−5.6
1982	144,690	−6,560	−4.3
1981	151,250	−7,290	−4.6
1980	158,540	−6,240	−3.8
1979	164,780	−7,520	−4.4
1978	172,300	−4,165	−2.4
1977	176,465	−10,375	−5.6
1976	186,840	−2,640	−1.2
1975	187,480	−6,650	−3.4
1974	196,130	−19,750	−9.1
1973	215,880	−10,579	−4.7
1972**	226,459	—	—

*Preliminary estimates and projections; **Peak year.
Source: "Franchising in the Economy 1983-1985," U.S. Department of Commerce, Bureau of Industrial Economics, January 1985. Service stations as defined by U.S. Census Bureau with 50% or more of their income from gasoline and oil products.

Service Stations: The Pace Slows Down

	1985	1984	1983	% Chng. '85-'84	% Chng. '84-'83
Total Establishments	130,000	132,080	136,570	(1.6)	(3.3)
Company-owned	23,400	23,774	24,583	(1.6)	(3.3)
Franchisee-owned	106,600	108,306	111,987	(1.6)	(3.3)
Total sales of products and services ($000,000)	$111,322	$107,040	$103,121	3.8	4.0
Company-owned	20,038	19,267	18,561	3.8	4.0
Franchisee-owned	91,284	87,773	84,560	3.8	4.0

Source: U.S. Department of Commerce, Bureau of Industrial Economics, "Franchising in the Economy 1983-1985," January 1985.

High Court Tells FERC To Redo Pipeline Regs

Independent refiners are applauding a recent U.S. Supreme Court decision upholding an appellate court ruling which said the Federal Energy Regulatory Commission must come up with guidelines by March to keep oil pipeline rates competitive.

The decision caps a lengthy legal battle and represents a blow to the Assn. of Oil Pipelines, which argued that marketplace forces already keep rates low. FERC agreed with AOP's position back in 1982, when it said Congress should consider deregulating oil pipeline rates because competition had proven effective in keeping transportation rates down. At the time, FERC said it was opposed to "aggressive federal intervention" and that it would only monitor rates if complaints were filed by individual pipeline users.

But a number of smaller refiners, led by Kerr-McGee, appealed the FERC ruling to the U.S. Court of Appeals for the District of Columbia. The court tossed out the FERC decision, claiming in March 1984 that the commission had ignored a congressional mandate to set "just and reasonable rates" in the transport of crude oil to consumers. "We cannot square FERC's statutory responsibilities with its own, quite novel principle that oil pipeline rate-making should protect against only 'egregious exploitation and gross abuse,' " the court wrote.

The case was taken to the Supreme Court by AOP, which argued that the FERC decision should stand. By accepting the appellate court verdict, the high court also let stand the lower court's ruling that FERC must set new guidelines for oil pipeline rates by March 1985.

The major oil companies remained neutral during the proceedings, according to a spokesman for the National Petroleum Refiners Assn.

Hit Again, Mobil Calls $100-Million Suit No. 2 A 'Ridiculous' Complaint

Mobil Oil again has found itself hit with a $100-million lawsuit from a former sales rep (and litigated by the same attorney).

A November filing in California superior court by Los Angeles-area lawyer James Carroll for ex-Mobil salesman Lanning R. Gans charges the company engaged in "TBA coercion and price fixing" during Gans' 10 years prior to his firing, according to a complaint copy obtained by *NPN*.

The suit mirrors a complaint filed in August—also handled by Carroll—from A. Karl Hemsley, another ex-rep who worked West Los Angeles [*NPN*—Oct. '84, p34]. Hemsley's suit was ordered re-filed by a judge citing its length and "extraneous material."

"The (Gans) complaint is ridiculous, and Mobil completely denies the allegations," says Mobil spokesman Tom Collins. "The suit is the same as Hemsley's but with Gans' name on it."

Whereas Hemsley was fired for "performance reasons," said Collins, Gans was fired because Mobil suspected he had a financial interest in a Mobil station, contrary to company policy statements which Gans signed.

On the opposite coast, Mobil is waging a heady offensive battle of its own against *The Wall Street Journal*, the nation's most influential financial newspaper.

Mobil says it is boycotting the *Journal* and has cut off all editorial and advertising contact "after five years or more of problems with working with them." The *Journal* says it will continue to cover the company "whether or not they send us press releases." The New York newspaper says the boycott came after the *Journal* carried a story about the planned construction of an office tower in Chicago by a real estate firm whose employees include the son-in-law of the Mobil chairman.

three refineries—one of which would be jeopardized if leaded gasoline was rendered uncompetitive.

"We are opposed to it," says Northwest Petroleum Marketers Assn. exec Gerry Everett of the leaded tax plan, "because this could disrupt the supply situation. If you have a sudden conversion to unleaded, I'm not sure refiners could meet that demand."

Murphy Oil's 39,000-b/d Superior refinery, which supplies Minnesota and Wisconsin marketers from its northwestern-most Wisconsin location, would be particularly hit. One company exec says operators had to bring in unleaded this year and expect to continue doing so for the next three years to meet demand before isomerization and other units can be brought on-line to produce enough unleaded.

Anything—a tax that deadens leaded demand or a federal decision to cut by 1 gram lead/gallon content to 0.1 gram/gal.—that would "artificially stimulate conversion to unleaded would jeopardize plant operation," says a company exec.

"If we're out of unleaded," he says, "customers can't be expected to come to us for leaded and go somewhere else for unleaded."

NY Cracks $200-Million Bootleg Gasoline Fraud

Climaxing a two-year investigation in which oil companies, associations and legitimate retailers cooperated, New York state officials have lowered the boom on unscrupulous gasoline distributors who were bootlegging motor fuel, adulterating grades and octane levels, and generally defrauding the government of more than $200-million a year in taxes.

In mid-December, state officials moved to prosecute 18 motor fuel distributors alleged to have participated in the scheme and to cancel the licenses of 161 motor fuel distributorships on similar grounds. The latter were primarily "dummy" corporations used in the massive fraud, which legitimate marketers have been fighting for several years.

More distributors were expected to be prosecuted later. No names were released at the outset last month. Tax officials estimated as much as 10% of the gasoline sold in New York state "could be bootlegged stuff." Most of the activity took place in the greater New York City area, although some upstate areas, including Rochester, Syracuse and Albany also were said to be involved.

The state said the "widespread gasoline bootlegging" was promoted in part by organized crime.

Department of Energy: SPR 60% Full and Rising

The U.S. Department of Energy estimates that the country's Strategic Petroleum Reserve stood at about 450-million bbl. of crude at the end of 1984, about 300-million bbl. short of the 750 million barrel goal set by Congress for the end of 1990.

The reserve, located in huge underground salt mines along the Texas and Louisiana Gulf Coast, now contains more than 90 days worth of oil, should imports be suddenly curtailed.

The Energy Policy and Conservation Act of 1975 outlined plans for a 1-billion-bbl. reserve following the Arab oil embargo of 1974. The first proposal, which called for storage of 500-million bbl. by 1982, proved to be grossly optimistic. By January 1982, only 230-million bbl. had been stored.

But DOE has picked up the pace in the last few years, and is now filling the reserve at a congressionally mandated pace of 159,000 b/d. Congress also dropped its ultimate goal from 1-billion to 750-million bbl., a target which DOE should meet handily if current fill rates continue.

DOE now claims its ability to withdraw the oil during an emergency—the so-called "drawdown test"—has also proven successful. In its most recent test last year, the reserve team was able to withdraw 1,053,000 bbl. during a 24-hour period from its West Hackberry, La. storage cavern, some 53,000 bbl. more than the DOE goal. The oil was pumped from the site to the Sun Oil Co. terminal near Nederland, Texas.

DuPont Alcohol Blend Awaiting EPA Waiver

Alcohol fuels proponents last month were awaiting an Environmental Protection Agency decision on whether to grant DuPont's request for a methanol/ethanol blend waiver from the Clean Air Act.

Most observers expected EPA approval sometime this month.

DuPont requested the waiver last July, claiming that the blend would protect automotive fuel systems and boost octane ratings. The blend contains 5% methanol, 2.5% cosolvent (usually ethanol) and a corrosion inhibitor. The company spent two years researching the blend after EPA rejected it.

The waiver, if granted, would be the third for methanol blends, the others being Arco's Oxinol and American Methyl's Petrocoal.

C-Stores' 'Gas' Share Still Growing

In excess of 20% of the total U.S. retail gasoline market this year will be dispensed through self-serve hoses at combination gasoline/convenience store outlets, estimates John F. Roscoe in his latest "Dollars Per Day" survey of the small food store industry.

Roscoe estimates that in 1983 some 14.6-million gal. or 14.71% of the total market moved through C-store type facilities. He put the total number of stores that year at about 53,000 and said 63% sold gasoline, with the average store dispensing 1,201 gal. per day.

Southland Corp., with annual sales of almost 1.4-billion gal., by far leads the C-store chains in gasoline sales. Six other chains (Munford, National Convenience Stores, Circle K, Conna, Casey's and Shop & Go) all had sales in excess of 100-million gal. in 1983.

Most chains reported rather slim gasoline margins. Shop & Go had an average of 3.2¢ and Lil' Champ 4.1¢, according to Roscoe, while NCS (6.7¢), Circle K (6.8¢) and Casey's (7.8¢) did better. Even so, seven of 11 chains surveyed each had annual dollar sales in excess of $150-million. Southland topped them all with over $1.5-billion in gasoline sales.

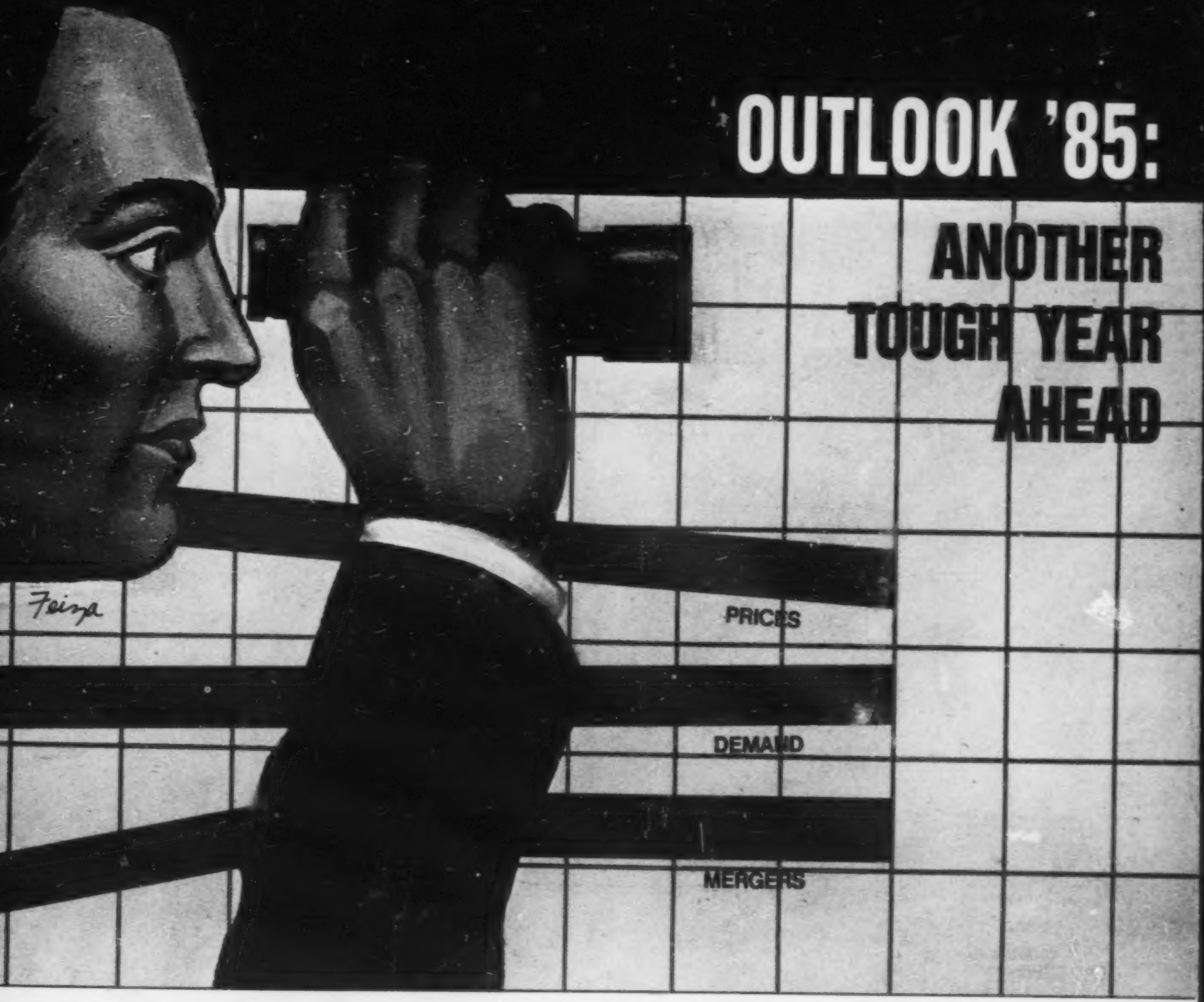
C-Store Chains' 1983 Fuel Record:

	Stores/ with 'Gas'	*'gas' units added*	*gallons sold (000)*	*'gas' margin per gallon*	*% sales from 'gas'*
Shop & Go	430/307	21	106,000	3.2¢	36.9%
National Convenience	1,081/775	80	310,000	6.7	39.7
Southland	7,299/3,007	180	1,361,200	NA	25.5
Circle K	2,185/1,463	665	346,000	6.8	37.1
Lil' Champ	183/101	19	24,943	4.1	31.1
Li'l General	436/212	4	44,794	NA	22.6
Casey's	427/427	50	145,129	7.8	63.4
Sunshine Jr.	345/321	−1	68,647	NA	52.0
Munford	916/469	−12	373,000	NA	NA
Dairy Mart	176/28	5	12,397	NA	NA
Conna	405/268	−21	134,000	NA	36.8

Source: John Roscoe's 'Dollars Per Day' and 'Gas Marketing' surveys, October 1984

OUTLOOK '85:

ANOTHER TOUGH YEAR AHEAD



With too much of everything on tap or readily available—crude, products, refineries, storage capacity and transport included—it's no wonder many oil marketers are looking at 1985 with a mixture of bland optimism, jaundiced apprehension and unconcealed perplexity.

They know instinctively that they are in for another year of hard decisions amid increasingly intense competition between majors and independents for the shrinking gasoline market, and between fuel oil dealers and utilities for the space-heating markets.

There also will be some hard knocks regarding underground storage tank regulations—federal, state and local—and probably some expensive problems in insurance coverage, which is going to become more difficult to get for either slow or disaster-type leaks.

By J. Richard Shaner
With Staff Reports

With all the product that's around, there's little likelihood that prices will firm up and/or that margins will improve.

To the contrary, it wouldn't be surprising to see a lot more 99¢ unleaded gasoline on the market than there is now in scattered areas, and perhaps some 90¢ leaded regular as posted loss leaders. Toward year's end, leaded regular at 95¢ gal. already was fairly common.

Mergers and acquisitions also are contributing to the skittishness. Wall Street and other observers keep talking about the possibility—even the probability—that there will be at least two and maybe three more big ones in 1985, while movers and shakers perceive a green light from the second Reagan administration.

Meanwhile, the year just ended was a better one than many oil companies had anticipated.

Department of Energy data showed that product demand, after five consecutive years of decline, actually rose 4.2% in 1984 as the economy surged upwards and recovered from the '82 recession.

Gasoline volume wasn't up too much—only 1.5% for the year. Nevertheless, it was a plus sign for a change. The same held true for middle distillates. They were up 7.1%.

Unfortunately, the same happy news isn't in the cards for 1985, according to the government forecasters. They say gasoline and distillate consumption will show slight declines this year, 0.6% and 0.7% respectively.

Independent Petroleum Assn. of America, which also has established a pretty good track record in forecasting, concurred with the federal prognosticators. But IPAA was a bit more conservative. It said gasoline volume in '85 would be even with 1984 and distillate demand would be down only 0.3%, not the 0.7% the feds predict.

All this, naturally, means that the apparent trend in prices isn't exactly pleasant.

The composite price for gasoline—the average for all grades and services—peaked at $1.31 gal. in 1981. It slipped to $1.28 gal. in 1982, to $1.22 gal. in 1983 and was projected to average $1.20 in 1984 and do no better than that in 1985.

Whether it can actually do that, however, remains to be seen.

In November, for example, *Lundberg Letter* reported that the composite price had already dropped to $1.18 gal.—the lowest annual level since 1979.

The OPEC Factor

Much, of course, will depend on what happens in the OPEC world in the first half of 1985. The OPEC nations agreed on production cuts of 1.5-million b/d in late October to support the shaky crude oil price structure. But before the conferees even got back to their homelands, some OPEC exporters were already discounting prices and exceeding quotas.

Most analysts agreed that the weak market could not tolerate this sort of a situation for a prolonged period. If the so-called $29 bbl. bench mark collapses, that would trigger a round of domestic price cuts or put so much pressure on the marketplaces that reductions would be inescapable.

Another factor of note is the disparity between the sale prices of light crude and heavy crude. There should be roughly a $1 bbl. difference, but in the real world the differential is closer to $3 bbl. Many refiners are now buying the heavier oil at bargain prices and processing it in more sophisticated equipment. A differential of that size equates to about 7¢ gal.

The outlook for residential heating oil is equally sobering.

Government data show that distillates averaged $1.19 gal. in 1982, $1.08 in 1983 and $1.10 in 1984. They are expected to do no better than $1.10 for the year 1985. But heating oil prices fluctuate violently with the weather and the region. A prolonged cold snap, such as occurred last winter, can make prices move up 10¢ to 20¢ gal. in a hurry.

As an aside, it might be noted, however, that the size of the distillate space-heating volume is steadily declining, due in part to competition from the gas and electric utilities and in part to the conservation ethics of thousands upon thousands of homeowners. Most of the increase in distillate consumption in 1984 resulted more from the expanding size of the diesel fuel cut for transportation than the requirements of the residential market.

Shaky Product Margins

With projections generally calling for little or no growth in demand for motor gasoline, the outlook for any improvement in oil product prices and margins for 1985 appears slim.

In fact, market conditions in the fourth quarter of 1984 indicated that the coming year could be possibly worse than the past two or three years. Gasoline prices were about as low as they had been all year, and the Northeast was reporting the warmest October in 15 years.

A shaky crude oil market existed at the time, with the Organization of Petroleum Exporting Countries (OPEC) trying desperately to prop up world prices. With its "official" benchmark price of around $29 bbl. being undercut from $1 to $2 in spot trading, OPEC was hoping that a cold winter and increased distillate demand would help its efforts to get world crude oil supply down before spring.

Most experts were expressing doubts that OPEC would succeed, though, and were speculating that there could be further easing of world prices.

The experts at year's end could see nothing much to cheer up motor fuel and distillate marketers insofar as profit margins between wholesale and retail prices are concerned.

Demand projections for 1985 indicate that gasoline consumption will show little, if any, change from 1984.

If this holds true, there is likely to be a continuation of the pitched battle that major oil companies, the convenience store chains, and large-chain gasoline marketers have been waging for market share for the past two or three years.

This battle royal could lead to more efforts by oil jobber groups to seek legislation to help curb what they consider to be unfair competition. Most such groups seem to believe forced divestiture of oil company direct-retail marketing operations and/or minimum markup laws would help do this.

An effort underway in Texas in this respect will bear watching as the year moves along.

The Texas Oil Marketers Assn. is following a well-planned and carefully laid out program which it thinks will probably lead to divestiture or minimum markup laws in Texas.

After conducting extensive surveys of alleged unfair marketing practices, TOMA got a Texas legislative committee to begin hearings in November. TOMA charged, in its opening salvo, that both the majors and C-store chains were engaging in unfair pricing practices aimed at forcing smaller jobber firms out of business.

The majors and store chains rebutted these allegations by claiming, in general, that the smaller firms were simply not responding to customer demand for less expensive gasoline. They said they weren't trying to drive anybody out of business by serving their customers' demands.

Some large-chain gasoline marketers who might be adversely affected by some new divestiture or minimum markup type legislation because of their similar direct-retail operations could wind up supporting, at least silently, some such legislation attempts.

The majors especially, such large independents claim, often subsidize their low retail prices with crude oil profits. These

Some '85 Projections by Government Forecasters

- **Motor Gasoline:** Consumption is expected to average 6.72-million b/d in 1984 and fall off slightly in 1985 to an average of 6.67-million b/d. This means 1984 consumption will be 1.5% over 1983 and 1985 will be 0.7% under 1984.

- **Mileage:** Miles traveled in passenger cars are projected to increase 4% in 1984 (over 1983), and another 1% over that in 1985. Car efficiency is projected to increase 5% between 1984 and 1985.

- **Distillates:** Fuel oil consumption is expected to average 2.9-million b/d in 1984 (up 7% over 1983) and 2.8-million b/d in 1985 (down 3.1% from 1983). Industrial activity and diesel fuel requirements accounted for much of the 1984 increase, and the deceleration of the economy and the tax increase on diesel fuel are expected to have negative impacts on distillates in 1985. Demand for residential heating oil also is expected to be depressed anew by fuel switching.

- **Residual:** Demand for residual fuel oil is projected to average 1.4-million b/d in 1984, which is about the same as in 1983. But this was the first break in the steady decline of recent years. It is only temporary, however. Demand is expected to resume its slump in 1985, averaging 1.3-million b/d, or −5.6%.

Washington: Few Changes, But More Taxes, Tank Laws

While it's still too early to be certain, last November's election made so few changes in the government that the year ahead may as well be titled, "1984, Part II."

Unlike the first months of his initial term, the first year of the second Reagan administration doesn't offer much in the way of an opportunity to dramatically alter the petroleum marketplace. And, the White House doesn't have to look far for controversial issues to tackle, so it's unlikely we'll see a major initiative directly affecting marketers. In fact, like many presidents before him, President Reagan may use his second term to pursue international issues and build his reputation as a statesman. Already the Washington rumor mill has it that the White House has given up the idea that it can persuade the Democratic-controlled House of Representatives to go along with many domestic plans, and will thus concentrate on foreign relations.

By the same token, the ideological make-up of Congress hasn't changed much at all either. The lawmakers who battled for and against the interests of marketers for the past two years are back in town again—ready to renew the skirmishes. In fact, the only areas where some change is likely will be on the issues where just one or two votes can make the difference. Every new Congress brings some shuffling of committee assignments, the kind of movement which often creates a one- or two-vote swing.

Agency Appointments

If a dramatic and long-lasting change is in the works at all, it will come in the regulatory agencies, especially the independent agencies such as the Federal Trade Commission, (FTC) and the Federal Energy Regulatory Commission. The members of these commissions serve five to seven-year terms, which means that over the next four years, any of them that were holdovers from the Carter administration will be up for reappointment. With that handwriting on the wall, some probably will be scouting around for new jobs now and may leave their posts early.

It's also a safe bet that a few cabinet-level officials will be leaving Washington as well. To the surprise of some, Environmental Protection Agency Administrator William Ruckelshaus resigned three weeks after the federal election, reportedly over White House-proposed EPA budget cutbacks. His resignation, effective Jan. 5, was seen by some as an indication that the Reagan administration might pursue environmental policy lethargically. [See related story on page 65.]

Another likely departure whose effects may be felt by marketers is Attorney General William French Smith. Under Smith, the Justice Department has kept a low profile on most antitrust matters, but that's a posture any likely successor can be counted on to continue.

When it comes to specific issues, it's surprising how many important items are on marketers' Washington agenda in this age of decontrol and deregulation.

Despite its lack of an obvious direct connection to the industry, the hottest issue for marketers may be the soaring budget deficit and the efforts by Congress and the White House to cut it. The reason: Any effort to deal with the deficit leads directly to taxes and budget cuts.

To halve the roughly $200-billion deficit, the White House plans big spending cuts that include elimination of the Small Business Administration, whose low-interest loans have helped many jobbers.

Elsewhere, while not billed as a deficit reduction plan, the Treasury Department's "tax simplification" plan would hit oil upstream. The proposal repeals the oil depletion allowance and tightens up drilling write-offs. But it also speeds up the phase-out of the so-called windfall profits tax.

The plan hits income taxes too, eliminating many deductions, including depreciation and interest.

In addition, excise taxes, including gasoline taxes, are revenue-raising possibilities, and there remains a long-shot possibility that the frequently mentioned import tax—on crude oil or finished gasoline—will resurface. One distinct possibility is that Congress may eliminate or reduce the current tax subsidy for alcohol fuels in its quest for more money.

While it isn't likely that 1985 will be the year the Petroleum Marketing Practices Act (PMPA) amendments introduced last year will be passed by Congress, the measure will be reintroduced early in the session and this time around, backers will have time for some arm-twisting on its behalf. Whether or not it can make any headway depends on whether the industry can unite behind it and whether the inevitable committee shuffling makes the lobbyists' job easier or tougher. The best guess right now is that PMPA won't be changed until 1986, if at all.

Year of the EPA

This year may well be dominated by the Environmental Protection Agency, at least so far as marketers are concerned. EPA seems determined to make significant reductions in the lead content of gasoline, a process that will come to a head early in the year.

It also is well into a study of leaking underground storage tanks. That issue probably will surface in the spring or early summer, and the outcome may mean additional paperwork for marketers and, in some cases, EPA-enforced tank replacements. This year also will be the first year EPA gets to enforce the new Resource Conservation and Recovery Act. This one's an unknown. EPA wasn't entirely pleased with the final form of RCRA, although President Reagan signed the bill. The agency is bound by law to enforce RCRA, but the law doesn't require that it be zealous in its enforcement. The agency's commitment to RCRA should be evident in the White House budget proposal due out later this month. The same figures may also hint at EPA's plans on other issues, as well.

Antitrust Involvement

On the antitrust front, especially mergers, the FTC is the agency in the spotlight, having finally asserted its jurisdiction over the petroleum industry over the past four years. Since the make-up of that panel is only likely to change by the departure of consumer advocate Michael Pertschuk, the agency's view of mergers and acquisitions that pop up in 1985 isn't likely to differ much from the deals it permitted last year.

Heating oil dealers probably will get some bad news early in 1985. This is the year that price controls on a large number of natural gas wells are due to come off. Word is that the end of controls will come sooner, not later. And, because demand is off right now, decontrol probably means a drop in gas prices as producers scramble to make what profit they can from the wells. If prices stay low, it could spur yet another round of conversions.

One of the most interesting battles in Congress this year may be the efforts of lawmakers to deal with the spread of automatic teller machines (ATMs) into gasoline stations, grocery stores and other nonbank facilities. Late in 1984, a measure to bring ATMs under federal jurisdiction was introduced, but didn't get much attention. The bill would have superceded several state laws, which treat ATMs more restrively than bankers (and some major oil companies) would like. This could be the most interesting legislative battle of all in 1985, as Congress attempts to come to grips with a technology that's tied closely to the controversy over interstate banking but has implications for many other industries as well. The only safe forecast on this issue is that a host of lobbyists and lawyers will be placing orders for new Mercedes by year's end. *—Thomas Goldsmith* independents allege that the majors seldom consider their station investments and other operating costs to arrive at their net profits.

"I know for a fact that in some of their sales meetings, they just talk about what their volume and share-of-market targets are for particular markets," says one who has attended such meetings of one supplier as a jobber customer. "You don't ever hear them mention profit goals."

But despite such criticism and probably more efforts to curb some of the competition with legislation, all indications point toward another year of hot price competition at the pumps and slim profit margins.

The situation may not be much better for distillate marketers, although much depends on the weather. A relatively snug supply situation could possibly result in strong margins during the early winter months if the weather is severe and foreign supply doesn't inundate the East Coast.

Some marketers are concerned that the farm diesel market will go from bad to worse because of the hard times farmers are having.

Some of the larger farmers, according to a marketer who supplies them, are turning increasingly to "till-free" planting and harvesting of crops. This means they simply spray chemicals on their fields to eliminate weeds and spray-plant their seeds, all by air. Diesel-consuming equipment goes into the fields only at harvest time, and then the spray process starts over.

"This is going to knock out a lot of agriculture diesel sales," says a Mississippi River delta marketer.

All in all, there seems little room for much optimism that supply and demand conditions, and hence prices and margins, will improve in 1985 over 1984.

[illegible]

DEMAND	1st Q	2nd Q	3rd Q	4th Q	Est. '85	Est. '84	% Chng.
Domestic Product Demand:							
Motor Gasoline	6,407	6,837	6,918	6,722	6,722	6,723	—
Aviation Fuels	1,165	1,168	1,198	1,176	1,177	1,165	1.0
Middle Distillates	3,321	2,916	2,746	3,183	3,040	3,007	1.1
Residual Fuel Oil	1,653	1,295	1,286	1,373	1,400	1,421	(1.5)
Liquefied Gases	1,765	1,386	1,417	1,718	1,571	1,570	—
Other Products	1,747	2,040	2,261	1,910	1,990	1,945	2.3
Total	16,058	15,842	15,826	16,080	15,900	15,831	0.4
Exports	680	718	675	680	588	694	(0.9)
TOTAL DEMAND	16,738	16,360	16,501	16,760	16,588	16,525	0.4
SUPPLY							
Domestic Production:							
Crude Oil	8,820	8,800	8,800	8,780	8,800	8,800	—
Nat'l Gas Liquids	1,588	1,589	1,576	1,595	1,587	1,605	(1.1)
Total	10,408	10,389	10,376	10,375	10,387	10,405	(0.2)
Imports:							
Crude Oil	3,335	3,633	3,862	3,632	3,617	3,360	7.6
Motor Gasoline	281	297	289	280	287	321	(10.6)
Aviation Fuels	59	65	54	50	57	57	—
Middle Distillates	240	238	268	267	253	268	(5.6)
Residual Fuel Oil	863	633	662	707	716	725	(1.2)
Liquefied Gases	251	189	195	241	219	209	4.8
Other Products	348	416	386	375	382	378	1.1
Total Imports	5,377	5,471	5,716	5,552	5,531	5,318	4.0
Other Supply	535	697	666	687	644	846	(23.9)
TOTAL SUPPLY	16,320	16,557	16,758	16,614	16,562	16,569	—
INVENTORIES							
Closing Stocks (000,000 bbl.):							
Motor Gasoline	239.3	232.9	222.3	225.3	225.3	229.5	(1.8)
Aviation Fuels	45.0	45.6	44.7	43.3	43.3	42.8	(1.2)
Middle Distillates	121.4	123.8	157.2	155.3	155.3	159.6	(2.7)
Residual Fuel Oil	45.0	45.9	46.0	46.0	46.0	47.9	(4.0)
Liquefied Gases	88.0	105.2	116.8	104.8	104.8	105.0	(0.2)
Other Products	52.1	50.6	43.5	45.9	45.9	43.9	4.6
Total Products	590.8	604.0	630.5	620.6	620.6	628.7	(1.3)
Unfinished Oils	112.5	109.5	109.7	107.8	107.8	107.5	(0.3)
Nat'l. Gas Liquids	10.8	11.6	11.8	11.6	11.6	11.5	(0.9)
Crude Oil	338.3	345.2	341.9	340.5	340.5	342.3	(0.5)
TOTAL INVENTORIES	1,052.4	1,070.3	1,093.9	1,080.5	1,080.5	1,090.0	[illegible]
Crude Runs to Stills	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Source: Independent Petroleum Assn. of America, Supply and Demand Committee, November 1984.

Station Outlook

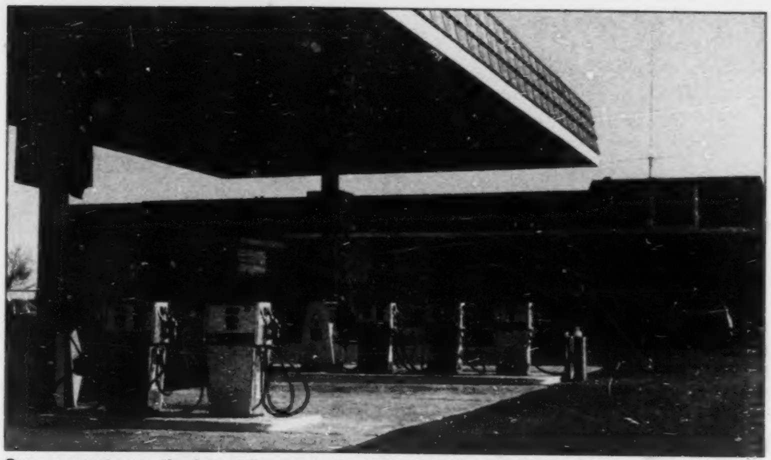
There was a bit of good news about service stations in 1984, but this is expected to be offset in 1985 as the trend toward more-expensive, higher-volume retail outlets continues.

It has been expected that the U.S. total of service stations would drop from 136,670 in 1983 to 130,000 in 1984. The drop continued, of course, but not as rapidly as had been forecasted. Fresh statistics from the U.S. Commerce Department's Bureau of Industrial Economics indicate the population at the end of 1984 was 132,080 and that the projected population for the end of 1985 is 130,000.

The Bureau of Industrial Economics' statistics are much more important this year in view of the U.S. Census Bureau blunder which makes it impossible for the industry to have a universe population total for the 1982 nose count. [See related story on page 28.] It must be remembered, however, that the service station data herein are for outlets which generate more than half of their income from the sale of gasoline and oil products. They do not include convenience stores and other places which dispense gasoline but make more money in other lines of work.

Lundberg Letter recently estimated the universe—that is, all places where motorists can buy gasoline at retail pumps—in the neighborhood of 190,000 in mid-1984. In 1972, the year the legitimate service stations peaked at 226,000, *Lundberg Letter* estimated the universe at 400,000.

A substantial amount of service station construction and modernization took place in 1984, reflecting the intensity of the competition for street sales by and between majors and independents. Virtually all of the majors have had extensive face-lifting programs underway for the past several years. Mobil, for example, has an ongoing five-year program into which more than $500-million has been committed for service stations old and new. A sign of the times: Mobil said it is spending as much as $1-million to $1.5 million for top-of-the-line locations and equipment. These stations are targeted to move 3-million to 5-million gal. monthly [*NPN*—Dec. '84, p40].


Some experts say the latest figures indicate that station closings will slow in 1985 or '86.

Such huge investments by the majors in retail outlets, coupled with high expenditures by large-chain independents in new and remodeled units, will keep the pressure on margins and drive more older, conventional stations out of business.

Most majors are expected to continue adopting tactics previously followed by the independents of trying to pump more gallons through fewer retail outlets. As more and more new units projected to pump from 100,000 to 150,000 gal. or more per month come on-stream, the total station population is bound to decline even further.

The way both the majors and indies plan to get such high volumes, of course, is primarily by being price aggressive. Since the convenience-store chains have similar targets in mind, downward pressure on retail pump postings is expected to remain fierce.

Some large-chain independents say they doubt rack-to-retail margins in highly competitive markets will average out at more than 5¢ to 6¢ gal. during 1985 because some marketers have whittled down their operating costs to market on such low margins. One such indie says that, even if competition lets him, he won't post prices to yield margins of more than 7¢ gal. "We've got our costs down to where we can make good profits at that level and we're not about to give our competition any breathing room," he says.

The majors have pretty much convinced everybody that they don't plan to improve margins, either, as have the large-chain convenience stores—despite the cash outflow for station improvement.

Unfortunately, industrywide capital investment figures are not readily avail-

The Federal Forecast for Supplies and Prices

	By the Year			
	History		Projections	
Demand (million b/d)	1982	1983	1984	1985
Motor Gasoline (total)	6.54	6.62	6.72	6.67
Leaded	3.41	3.65	3.94	4.11
Unleaded	3.13	2.97	2.78	2.56
No. 2 Heating Oil	2.67	2.69	2.88	2.79
Residual	1.72	1.42	1.42	1.34
Other Products	4.37	4.50	4.85	4.98
Total U.S.	15.30	15.23	15.88	15.78
Prices (per gal.)*				
Motor Gasoline**	$1.28	$1.22	$1.20	$1.20
No. 2 Heating Oil				
Wholesale	0.97	0.82	0.84	0.84
Retail	1.19	1.08	1.10	1.10
Residual***	—	0.65	0.70	0.70

* All prices include taxes except No. 2 heating oil. ** Average for all grades and services. *** Average for all grades of sulfur.

able this year, for the first time in a decade or more. McGraw-Hill, Inc., which surveys the oil and other industries and reports on capital expenditure plans—past, present and future—indeed, has made figures available but only to subscribers on a fee basis and for internal use only.

A lot of what happens in 1985 capital investments, especially marketing, depends on the fourth-quarter 1984 profits, and those of the four quarters of 1985. Third-quarter 1984 was weak, even though gasoline consumption was up slightly. Fuel oil consumption was dogged by the warmest October in 13 years. If this pattern persists throughout the fourth quarter, year-end profits will be off noticeably for many companies.

This, of course, will force either retrenchments in 1985 marketing projects or abandonment of many secondary items.

Flow from Abroad

In addition to the underground storage tanks and the stage II vapor recovery situations, there are several areas which could blossom into real problems in 1985.

The first of these is the matter of gasoline imports. Even though the domestic market had more than it needed, the flow of gasoline imports increased materially in 1984. American Petroleum Institute, for example, noted in November that gasoline imports were up 50,000 b/d in the first 10 months of 1984, or roughly 20% higher than in 1983. There also were indications that this total may be understated by 30,000 to 50,000 b/d because of definitional problems and the failure of some companies to report their imports.

Of more concern, however, is the fact that refineries with aggregate capacities of about 3-million b/d are being built in the Middle East, with U.S. markets one of their prime targets for product. Inasmuch as their crude oil prices to themselves are much lower than their prices to international markets, the probability of much lower product prices is obvious.

There already has been some talk in Washington about putting some sort of control on the product imports before the situation gets out of hand [*NPN*—Dec. '84, p16]. But independent marketers are opposed to any restrictions because of the price flexibility it gives them in competition with major domestic refiners and suppliers. Society of Independent Gasoline Marketers of America particularly is opposed to any restrictions on gasoline imports.

Mega-Mergers: Chapter II

The matter of acquisitions is and will be sensitive in 1985 too; not the smaller buy-outs and sellouts, but the big ones involving the top and second tiers of oil companies.

The march of mega-mergers resumed in late 1984 when Texas oilman T. Boone Pickens and his Mesa Petroleum and a partner took aim at Phillips Petroleum. [See story on page 18.] The long-anticipated shot heard 'round the oil patch—a $60/share offer valued at nearly $8.8-billion—could trigger higher bids and ring in a new year of acquisition activity.

The industry is still awaiting the denouement of the Texaco/Getty and Chevron/Gulf mergers. Texaco is already in full control of the old Getty marketing string in the Midwest but is awaiting Washington approval of its proposal to sell the East Coast Getty operations to Power Test Corp., of Plainview, N.Y. In the same vein, Chevron is awaiting the federal OK on its proposed sale of Gulf's southeastern marketing facilities to Standard of Ohio.

There's bound to be a lot of shifting and changing in the wake of these approvals, so it will be months before the dust settles on either or both. And, it may be years before the Gulf logo disappears in the Southeast. Chevron's proposal gives Sohio the right to use the Gulf name for at least five years, if it so desires.

What's more, the mergers may continue. A recent *Forbes* magazine article entitled "Waiting for the Next Big Oil Takeover" doesn't just speculate, it says flatly, "Don't be deceived by the current calm after the election, the wheeling and the dealing for oil companies is likely to begin again with a vengeance."

Financial newspapers and other business publications are in a like mood, namely, not just whether but how soon and who's next.

Mostly likely candidates—or at least the ones most talked about—are Union Oil of California, Amerada Hess, Sun, Tenneco, Kerr-McGee and, surprisingly, Mobil, the nation's No. 2 oil company.

Union, Sun, Hess and Phillips have said publicly they're not interested in being acquired and have shorn up their ramparts to fend off what would be regarded as hostile takeovers.

The more interesting question, however, is who might the buyer be? Mobil, Texaco and Chevron are not in the market anymore because of their respective purchases of Superior, Getty and Gulf. Of the upper tier, that leaves Exxon, Amoco, Atlantic Richfield and Shell. Exxon, because of its size, is not generally regarded as a buyer and Shell is in the process of being re-absorbed by its European parent, Royal Dutch. That leaves Amoco and Arco, both of which have good credit lines available. In fact, Arco had lined up enough money to express interest in Gulf but dropped out when the price reached record-breaking levels.

Some of the Arab countries and oil companies have indicated interest in the American market, so don't be surprised if

Quarterly Averages

1984				1985			
1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q
6.34	6.88	6.90	6.76	6.41	6.77	6.86	6.66
2.69	2.86	2.84	2.72	2.53	2.62	2.61	2.49
3.65	4.02	4.05	4.04	3.88	4.15	4.25	4.16
3.20	2.79	2.58	2.96	3.00	2.74	2.51	2.90
1.74	1.30	1.26	1.39	1.66	1.21	1.18	1.30
4.77	4.61	5.02	5.00	4.92	4.77	5.12	5.11
16.06	15.58	15.75	16.11	15.99	15.50	15.67	15.97
$1.20	$1.22	$1.19	$1.20	$1.18	$1.19	$1.20	$1.20
0.88	0.83	0.83	0.84	0.84	0.84	0.84	0.85
1.13	1.08	1.08	1.10	1.11	1.10	1.10	1.12
0.69	.068	0.69	0.73	0.73	0.70	0.67	0.69

Source: Energy Information Administration, Short-Term Energy Outlook, November 1984.

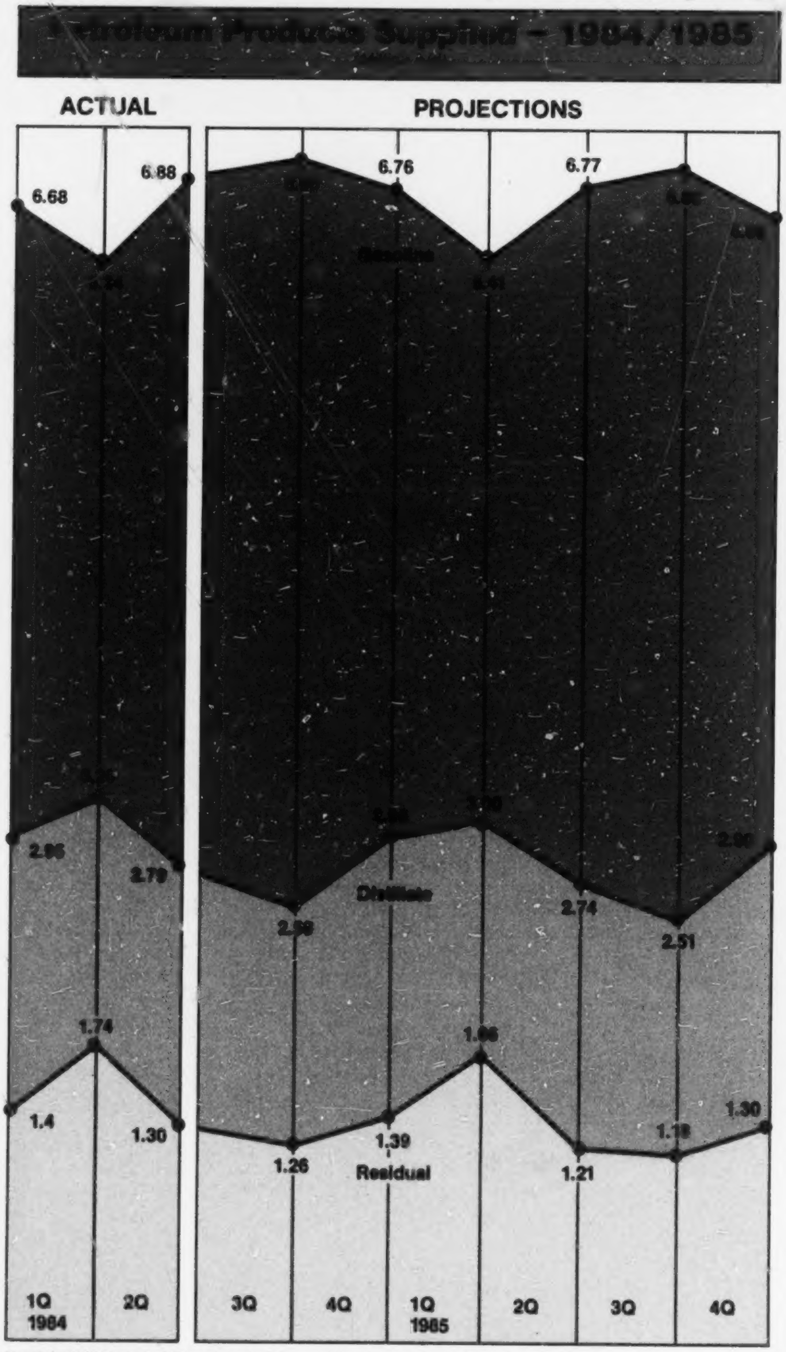
one of them suddenly makes an acquisition offer for an American firm.

Most analysts believe acquisition bids will pretty well have to come in the first 12 to 18 months of the new Reagan administration lest time run out on the favorable support such a maneuver might obtain in Washington.

Declining of Refining

Motivating the mega-mergers of the past and those yet to come is the need for proved reserves of crude oil and natural gas. There is no question that it is getting more difficult and more expensive to drill for oil and gas in conventional fashion at home and abroad, and the odds generally are long.

A specific example of this was Shell's recent decision to abandon its high-stakes probe of the deeper waters of the Atlantic Ocean off the New Jersey Coast. Shell, in behalf of assorted partners, drilled four consecutive dry holes at a cost of $100-million. Previously it had drilled four other dry holes for a total of eight dusters in the Atlantic. All told, two dozen oil companies drilled 40 holes in the Wilmington and Baltimore Canyons off New Jersey and the Georges Bank off New England in recent years, spending more than $3-billion in the process and coming up with 35 dusters and five holes with inconsequential showings.



Graph by *NPN* based on Department of Energy Short-Term Energy Outlook, Nov. 1984.

Refineries are going to continue to be a drug on the market in 1985 and more can be expected to fall by the wayside with their demises hastened not only by sated markets and poor recovery economics but also by the imponderables of the Environmental Protection Agency's stepped up push to phase out the lead in gasoline.

Even though 50 or more refineries have been shut down forever or mothballed indefinitely in the past several years, and throughput has been reduced by 1.5-million b/d or so, many suppliers feel there's still too much capacity readily available.

"What's really needed," said one supplier at a recent meeting, "is another shakeout which would cut off another 1.0-million to 1.5-million b/d. That would put us more or less in line with what we need. And, it would let the survivors operate a bit more efficiently and economically."

U.S. refineries are still operating at less than 80% of capacity, which is a level they have to be above to maximize operations and profits.

Some suppliers and independents are privately fearful that when the Middle East refineries come on-stream in 1985, the economics of their output may have a telling impact on the smaller refineries which are still struggling to stay alive.

That the industry as a whole is genuinely concerned in the refinery picture is obvious in the National Petroleum Council's creation of a new study committee to update its profile of the U.S. industry and its ability to meet projected demands. The study by the quasi-government agency will take a look at capacity changes including closings, debottleneckings and additions, as well as the survival probabilities of the smaller units. The report is due late this year.

EPA's decision to accelerate the lead phaseout in 1985 so that by Jan. 1, 1986 it could be reduced to a level of 0.1 gram/gal. isn't going to help precariously balanced refineries. The majors aren't too happy with the EPA phaseout either. For many, it's simply too fast, and they feel that they will be unable to meet unleaded requirements in such a short span of time. Unleaded gasoline is expected to account for at least two out of every three gallons sold in 1985. And eight out of 10 by 1988-89.

It can be assumed that the lead phaseout will generate an uproar in Washington and throughout the industry in 1985. Given the floundering nature of EPA, the likelihood is that compromises will fend off a full confrontation until 1986 or 1987, when the use of leaded gasoline will be approaching its own sunset period.

EPA's long-overdue decision on stage II equipment for service stations and/or cars also should surface sometime in early 1985, thus precipitating another storm of controversy no matter which way it goes. The oil industry favors the use of onboard canisters in cars to collect vapors in lieu of the heavy nozzles and extra equipment that would be necessary to do it at the pump. The automobile industry, naturally, is adamantly opposed to canisters or any other additional equipment not of their own making.

Lurking in the background, as sort of a fallout between the lead phasedown and the stage II programming, is still another problem. This is the admitted fact that as the lead is eliminated, refineries must use other processes or additives to raise the octane numbers of the gasoline. This leads to more volatile gasolines which could give off even more fumes.

Additional refining, some industry people say, will lead to more butanes in the gasoline. The oil industry has its own volatility standards and some states have already adopted these as their own. But a General Motors survey last spring reportedly estimated 20% of the gasolines already exceed the voluntary volatility standards.

There's also a question of toxicity. And, there's also the alcohol issue. Some companies are using alcohol as an enhancer, others are deriding it as a troublesome, worrisome additive that motorists should steer away from. No doubt much will be said and done by all sides, including the government, in the new year.

All in all, up and down the petroleum industry, it appears that 1985 is shaping up to be a long struggle.

Industry Gets Five-Year Case of 'Datalock'

For a host of larger-than-life reasons, the true scope of petroleum marketing could remain a mystery for the rest of the decade.

A major data-collection snafu in Washington and the industry's downstream jigsaw puzzle which has been scrambled by the continuing oil merger fever are tearing asunder efforts by industry analysts, economists and statisticians to quantify and track many aspects of gasoline and fuel oil marketing.

It may be 1989 or so before the situation rights itself and statistical sanity returns.

The figures are important, especially now with the changes that are taking place in the marketplaces and the disappearance of many companies from national and regional scenes. The figures are used by industry and government alike to measure growth, retrenchment, progress, performance, the impact of the acquisitions, bankruptcies, spinoffs and so on.

There always has been a certain amount of guesswork involved in the compilation of this data and often it has been difficult to reconcile one set of figures put out by one group with those of another.

What's going to make the picture murkier for the next five years or so is the slip-up that occurred in the 1982 compilation of retail businesses. These censuses are made every five years. The Census Bureau relies on the Internal Revenue Service to collect specified data such as confirming figures on the number of service stations, the population of the fuel oil industry, the LPG industry, etc., the dollar value of their businesses and so on.

In 1982, however, the Census Bureau says IRS miscoded some of its data and, as a result, it can only come up with figures on that portion of the industry which has payrolls. Thus, no 1982 count is available on the "moms and pops" and the smaller one-man companies. In other words, no one will be able to have a "universe" figure on service stations, fuel oil dealers, LPG dealers, garages and automotive stores and the host of others involved in retail operations without slide-rule guessing.

Even that's going to be very tough. It used to be that 20% was considered a fair figure for the number of moms and pops in gasoline and fuel oil retailing. No more. These are the ones that have been dropping out like flies, and no one's really sure anymore how many are left. The '82 census was supposed to provide something of a feel on that. But that's out too. Now, everybody has to wait until the next census in 1987—and probably 1989 before the figures are released.

In the interim, the only statistics of value are those of the Commerce Department's Bureau of Industrial Economics. Aided by a questionnaire of his own, a flock of telephone calls to associations, publications and informed individuals, director Andrew Kostecka puts together an annual estimate and forecast on the service station population in January of each year. Hindsight has proven his figures reliable and generally on target.

The merger/acquisition mania also is making mincemeat out of conventional data.

If, for example, you were asked to name the top 10 oil companies, could you do it? Or would you get lost too deciding which is the preferred ranking tool: sales, assets, earnings, number of service stations, number of employees, amount of product sold daily, etc., etc.?

Fortune magazine uses gross sales as its prime benchmark in its 500 top companies listings. So does *Forbes*. *Business Week* uses a segmented, alphabetical approach in its Corporate Scoreboard. *NPN Factbook* uses company assets as its measuring stick. Others use book values and stock quotations.

The fun started when Texaco bought Getty. Media people simply added the basic figures of the two companies and decided (Eureka!) that Texaco had leapfrogged past Mobil to become No. 2 again. Not considered was the fact that when Texaco finally spins off certain Getty properties, as required by law, the ranking figures will change materially.

When Chevron bought Gulf, the media jumped Chevron from fourth or fifth to second—ahead of both Texaco and Mobil. Here again, the actual ranking cannot be resolved until Chevron finishes disposal of the southeastern facilities and other Gulf assets to comply with Federal Trade Commission requirements for approval. When that's finalized, the numbers will change again. Meantime, they're in some sort of limbo.

When Mobil bought Superior, it regained its No. 2 rank in gross sales but not in employed assets. So, there we go again.

The fact that many Wall Streeters and industry experts believe that two and perhaps three fairly large companies will be acquired in 1985 makes the ranking problem all the stickier. Already last month, Mesa Petroleum's T. Boone Pickens and a partner made a long-awaited move with a bid worth nearly $8.8-billion for Phillips Petroleum stock Mesa didn't already control. Even giant Mobil has fallen under the merger specter in recent months.

Probably the only one that's safe and secure is Exxon, which, with $63-billion in assets, $93.4-billion in gross revenues, and $5-billion in annual earnings, is No. 1 in almost everything. Funny thing though: Depending on how the Texaco-Getty and Chevron-Gulf shakeouts go, Exxon may wind up as No. 3 in daily product sales despite its gargantuan size.

There are quirks in marketing too. Southland Corp., basically a C-store chain, became the nation's leading independent marketer of gasoline—until it acquired a refinery when it bought Citgo's marketing facilities from Occidental Petroleum. Thus, it's now a refiner-marketer. Power Test Corp., out on Long Island, N.Y., is awaiting approval of its bid to buy the East Coast Getty network that Texaco must divest. If it gets it—and the going has been rather rough so far—*it* will become the nation's leading independent gasoline marketer.

O&E Briefs

Truck Owners Weigh IRS' 'Odd' Changes in Taxes

Transport owners are due to face slight changes in the way the Internal Revenue Service collects its heavy truck taxes, as part of an IRS tax simplification plan, although dollars-and-cents effects are harder to pin down.

Early last month, the Petroleum Marketers Assn. of America was evaluating the likely affects of the proposal, which remained to be finalized. Barbara Faulkner, PMAA's vice president of policy and legal affairs, says individual marketers will, indeed, be affected, depending upon business size and the number of trucks, but that the only clear-cut effect may be the simplification of tax payment.

Under the proposal, the IRS could eliminate all references to the number of axles per truck in Form 2290. Tax rates instead would be based upon the highest weight at which a vehicle is registered.

Following the tax period ended June 30, 1984, the IRS would levy a $100 tax on trucks weighing between 55,000 and 75,000 lbs. Owners would be required to pay an additional $22 for each additional 1,000 lbs. over 55,000. (The current schedule provides for an additional $3 for each 3,000 lbs. over the 75,000 lb. ceiling.) Under the proposal, vehicles weighing more than 75,000 lbs. would be taxed at the flat rate of $550.

The changes would not affect marketers owning trucks driven less than 5,000 lbs. in a taxable period as the small owner-operator exemption does not expire until June 30, 1985.

Md. Uncorks Tough Law On Underground Tanks

New underground tank regulations banning the installation of unprotected bare steel tanks and calling for mandatory daily inventory reconciliation are scheduled to become law this month in Maryland.

The state's Department of Natural Resources last month was evaluating comments on the regulations which also require tightness testing for tanks more than 15 years old. New tanks would have to be cathodically protected, fiberglass-coated steel or made entirely of fiberglass.

A Department spokesman early last month said that the law's final draft would contain only "minor changes."

Jobber and dealer groups are generally supportive of the measure, with a few objections pertaining to wording, according to a spokesman for the Greater Washington/Maryland Service Station Dealers Assn.

C-Store Briefs

C-Stores to Repeat '84 Success Pattern This Year

Franchised convenience stores, which represent about one-third of the gasoline industry, increased their ranks 4.4% in 1984 and are expected to grow at the same rate in 1985 to a total of 15,998 units.

The money prospects are even more fascinating, however. Gross sales are expected to jump 10.3% in 1984 and 10.3% in 1985.

These are the good tidings contained in the 1983-1985 franchising report which is to be issued later this month by the Bureau of Industrial Economics of the U.S. Department of Commerce.

The entire C-store industry is estimated at 50,000-plus stores, and about half of those sell gasoline. The same ratio is believed to prevail in the franchised division. Southland, the nation's biggest C-store chain, is also the nation's biggest independent gasoline retailer.

The franchised stores are expected to do about $12.3-billion worth of business this year while continuing the $1-billion-a-year growth pattern it has enjoyed during the past several years.

C-Stores: The Growth Continues

	1985	1984	1983	% Chng. '85-'84	% Chng. '84-'83
Total establishments	15,998	15,331	14,683	4.4	4.4
Company-owned	9,109	8,795	8,446	3.6	4.1
Franchisee-owned	6,889	6,536	6,237	5.4	4.8
Total sales of products/ services ($000,000)	$12,309	$11,189	$10,148	10.0	10.3
Company-owned	7,819	7,080	6,389	10.4	10.8
Franchisee-owned	4,490	4,109	3,760	9.3	9.3

Source: U.S. Department of Commerce, Bureau of Industrial Economics, 'Franchising in the Economy 1983-1985,' January 1985.

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NATIONAL PETROLEUM NEWS

FEBRUARY 1985 VOL. 77 NO. 2

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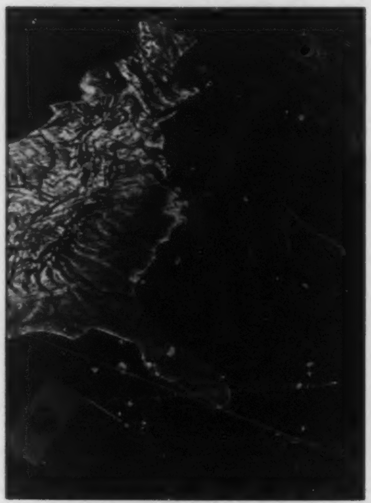

Already reeling and bleeding from four years of brawling over a shrunken market, U.S. refiners and marketers may face their toughest foe yet over the next few months: oil product imports. Page 36

Cover photo by John Apolinski, Chicago

EXPRESS LANE FUELING
CREDIT CARD SERVICE
CARD
RECEIPT

The automation revolution in oil marketing is continuing, but without the fervor it initially had. Its leaders say confusion must be eliminated before the trend can regain momentum. Page 40

PHILLIPS
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While its jobbers extend virtually unwavering support, Phillips must make some tough decisions—such as whether to maintain refining and marketing—as a result of winning its battle against T. Boone Pickens. Page 29

Mideast OPEC nations. According to various sources, since decontrol about 3-million b/d of new refinery capacity has been built or currently is nearing completion in various OPEC countries.

The International Assn. of Independent Tanker Owners has estimated that Middle Eastern refinery capacity will rise to 5-million b/d by 1990.

When the refinery buildup began in the Mideast, reports indicated that their primary purpose would be to supply fuel oil to European markets. But now, it seems more and more of the Mideast product output may be targeted for the U.S.

There have been reports that a new 500,000 b/d Saudi Arabia refinery has targeted from 15% to 20% of its production for U.S. shores. It is claimed that some foreign oil producers sometimes require U.S. companies to purchase foreign-produced products as part of their crude oil purchase agreements.

In addition to the Mideast refineries, API reports that Mexico is a large source of gasoline imports into the U.S., followed by Canada, Venezuela and the United Kingdom. In addition, there is considerable traffic between West Coast marketers and China.

Price Is the Key

Aside from some suspected "innovations" in classifying gasoline imports to get the best tax break, U.S. opponents to the growing tide of imports say they are coming in at prices U.S. refiners simply can't match.

AIRA's Bragg, who believes foreign gasoline already may supply 10% of the U.S. market, has said the product is coming in at a price "that by the barrel

Why Imports Compound U.S. Refiner Woes

Already ravaged by a tumble in the once-expected demand for oil products, domestic refiners may have to continue shutting down or shifting down operating capacity because product imports are robbing U.S. refiners of a part of their market.

Ironically, the rising tide of product imports comes at a time when some analysts believed the shakeout in refining capacity would begin to settle down and, perhaps as early as this year, some equalization between domestic refining capacity and current demand conditions could be reached. But the flood of imports, some warn, has the ability to drown out such an optimistic scenario.

If the gasoline tide continues to grow on the East and West Coasts, more of the marginal refiners can be expected to give up, and some of the majors may be inclined to mothball additional capacity. With 3-million b/d of refining capacity soon coming on-stream in the Mideast, the threat is quite real. These refineries, with cheap crude at their disposal, can duplicate on the East Coast the heavy flow of cheap Chinese gasoline which began on the West Coast more than two years ago.

Gasoline imports in November were close to 350,000 b/d. The American Petroleum Institute noted last October that gasoline imports were up roughly 50,000 b/d or 20% over the first 10 months of 1983. API indicated there is concern that the figures actually are understated by 30,000 to 50,000 b/d, which, if true, would mean that gasoline imports were at the 400,000 b/d level at the end of 1984.

That's nearly 10% of U.S. consumption—a dangerous level when many domestic refiners are walking very tight profitability lines.

Imports have borne much of the blame for substantial cutbacks in refinery operations in recent months. For example, Texaco last fall hacked its 242,000 b/d Port Arthur, Texas, throughput and employee rolls about in half, and its chairman cited import product as part of the reason.

Other refineries no doubt have been affected, at least in part, by the impact of imports. Rising imports since roughly the time of oil decontrol four years ago have fueled refinery failures and fallout already underway. Charter Oil, for instance, threw in the sponge and put its Texas refinery up for sale, and walked away from its partnership in the Bahamas refinery, once the world's largest. Southland Corp., the nation's biggest independent retailer, laid off half the people at its Citgo facility in Lake Charles, La., and cut back on production. Several major U.S. refineries in the nearby Caribbean also have announced shutdowns or severe cutbacks recently.

But it is the small refinery which has been most under siege since crude oil distillation capacity began to slide following its peak in 1981. More than 90% of the shutdowns in 1982 alone affected units with capacities of less than 50,000 b/d, according to a government survey. About 40% were less than 10,000 b/d. Of course, a contributing factor to the closures of the small facilities was the loss of the government's bias tilt, which had enabled many of them to prosper, despite their acknowledged inefficiencies and inadequacies. The "small refiner bias" lasted from 1973 to 1980.

The troubling refinery situation has prompted the U.S. government to ask the National Petroleum Council to survey and evaluate the industry's ability to meet future needs, with special attention to the small regional facilities. Just now getting underway, the survey should see results by year's end.

The role of imports in the industry's current predicament is the subject of an API study. Other refiner groups have begun responding to the imports dilemma in like fashion. [See main story.]

The economics of refining for many have become negative or very thin at best, with one source noting most refiners barely make maintenance and replacement costs these days. For others, the flow of product imports into their U.S. markets may be just enough to push their plants over the edge.

U.S. Refineries Since Decontrol . . .

Year **	Number Refineries*	Number Shut Down	Crude Oil Distill. Cap. (000 b/d)	Change vs. Year Earlier (000 b/d)	Refinery Utilization
1980	324	—	18,620	+0.632	75.6%
1981	301	23	17,889	−0.731	68.5
1982	258	43	16,859	−1.030	69.8
1983	247	11	16,137	−0.722	71.6
1984 ***	240	7	16,262	+0.125	76.1

*Operable or idled, i.e., can be reactivated in 90 days or less.
**As of December 31.
***Estimated, with utilization rate based on first 10 months of 1984.
Source: Department of Energy; American Petroleum Institute.

Crude Distillation *(As of Jan. 1 each year)*	1984	1983	1982	1981	1980
Less than 10,000 b/d	63	67	82	91	102
10,001-30,000 b/d	55	59	80	93	83
30,001-50,000 b/d	41	40	44	42	39
50,001-100,000 b/d	41	44	43	44	44
100,000-175,000 b/d	26	26	30	27	25
Over 175,000 b/d	21	22	22	27	28
Total	247	258	301	324	319

Source: Department of Energy

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Do They Endanger Industry's Image?

Tax Evasion and Mislabeling Rip-offs

Buyer's Guide Issue

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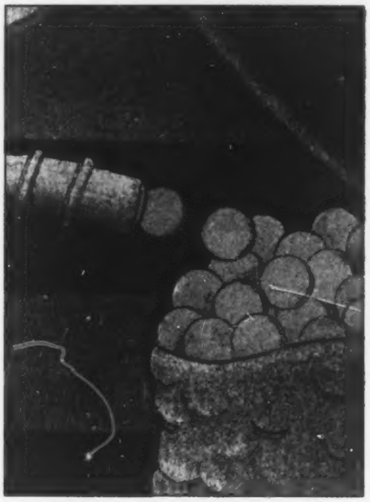

It's not that serious a problem yet, but blatant tax evasion, commingling of brands and grades, bootlegging product and shortchanging octane numbers is spreading and could tarnish the industry's image. **Page 38**

Cover art by John Tyszko, Chicago

Pilot Oil, Knoxville's sharp private-brand marketer, exudes a positive image, starting with Jim Haslam, that's carried it to super-jobber status. **Page 46**

With little competition, southeast Colorado jobber Don Morrison provides many services, but his retail cardlock operation provides a healthy margin and a loyal customer base. **Page 51**

• LATE NEWS

PMPA Amendments Still Kicking Around Capitol

Proposed amendments to the Petroleum Marketing Practices Act (PMPA) late last month sat waiting to be introduced into Congress, depending on the kind of responses two House members received from the balance of supplier companies they had written earlier.

One of the amendments sponsors, Rep. Tom Tauke (R-Iowa) told those at the Petroleum Marketers Assn. of America winter board meeting that he and co-sponsor Rep. Mike Synar (D-Okla.) stood a good chance of introducing the amendments following reviews of majors' responses to the congressmen's letters.

By mid-February, nine of the 22 suppliers had written, saying generally they saw nothing in the marketplace that would merit changes in PMPA—a response PMAA spokesman David Morehead called "unsatisfactory." Tauke and Synar expected to have reviewed the remaining letters sometime this month.

The PMAA board also voted to push for a fund separate from so-called "superfund" money, for tank leak cleanup not covered by insurance [*NPN*—Feb. '85, p32]. While members sought to stave off application of superfund law and use of superfund money for leak cleanup, they did not resolve how to develop such a fund. PMAA earlier had expressed support for an increase in the federal excise tax, as opposed to tank registration fees supported by the American Petroleum Institute. PMAA also hoped that such a fund would contribute to tank replacement costs and act to stem the tide of rising insurance costs.

The board also discussed proposed Internal Revenue Service record-keeping rules and the possible imposition of an oil import fee to help ease Uncle Sam's budget deficit. IRS was to have required marketers to keep detailed travel logs for tax reimbursement purposes, but PMAA said that new rules will exempt vehicles used more than 75% of the time for business.

PMAA also passed a resolution opposing oil import fees, in the wake of a similar non-binding resolution by House member Silvio Conte (R-Mass).

18 Refineries Shut in '84, Fewer than in Previous Year

The federal government's latest update on U.S. refinery closings says another 18 were shut down in 1984, cutting off 420,370 b/d of crude oil distillation capacity.

Since new construction and modifications added some capacity in 1984, the net loss for the year was calculated at 360,000 b/d. At the beginning of 1985, the Energy Information Administration said there were 229 operable refineries in the U.S., compared with a total of 301 on Dec. 31, 1981, when the big slump began.

Last year's closings, however, were somewhat less severe than those during 1983. That year, the industry lost 11 refineries with a total distillation capacity of 501,350 b/d, *NPN Factbook* figures show.

Nine of the refineries shut down in 1984 were less than 10 years old, while the balance ranged from 16 years to 36 years. EIA said crude input averaged 12.1 million b/d in 1984. Refinery utilization, with a mild increase in demand and less operable capacity to handle it, rose to 76.4%.

Refiner	***Location***	***Crude Distil. Capacity***
Caribou-Four Corners	Woods Cross, UT	8,400 b/d
	Farmington, NM	2,200
Celeron Oil and Gas	Mermentau, LA	11,000
Dorchester Refining	Mt. Pleasant, TX	26,500
ECO Petroleum	Long Beach, CA	7,000
Eddy Refining	Houston, TX	3,250
Hill Petroleum	Krotz Springs, LA	57,400
Marlex Oil and Refining	Los Angeles, CA	21,100
Mid-Gulf Energy	Engleside, TX	39,400
Port Petroleum	Stonewall, LA	3,200
Powerine Oil	Santa Fe Springs, CA	42,120
Quintana Petrochemical	Corpus Christi, TX	33,300
Southern Union Refining	Lovington, NM	36,100
Tesoro Petroleum	Carrizo Springs, TX	26,100
Tonkawa Refining	Arnett, OK	12,000
Tosco	Bakersfield, CA	38,800
	Duncan, OK	47,000
Warrior Asphalt	Holt, AL	5,500
Total		***420,370***

Phillips' War of Worth: Will the Price Be Met?

Feelings were growing in industry and financial circles late last month that Phillips Petroleum's days as an independent entity could be numbered, especially after it essentially put a $62/share price tag on the company when it maneuvered to withstand the latest of two hostile takeover attempts since December.

The first bid for control of Phillips came from Texas oilman T. Boone Pickens, one which cost the company $30-million in fourth-quarter profits and forced it into a recapitalization program valued at roughly $53/share [*NPN*—Feb. '85, p29].

(Pickens in mid-February raided 7.9% of Unocal stock, fanning speculation about another takeover attempt.)

But before the company even could present the plan to stockholders on Feb. 22, financier Carl Icahn submitted an $8.09-billion offer (the first of three) worth about $55/share. Phillips responded by seeking injunctive relief whose proceedings were expected to drag on into March.

Days later, however, Phillips managers let on they believed the company's stock to be worth $62/share and that directors would be willing to submit to stockholders such an offer. Meanwhile, the company revised its recapitalization plan valued at $8.05-billion, just shy of Icahn's offer.

Exposed and beleaguered, Phillips became the subject of speculation about rescues from "white knights," such as Exxon, Standard of Indiana, Atlantic Richfield, Royal Dutch/Shell, British Petroleum or other foreign interests with the money and the inclination.

With some 1.17-billion bbl. of liquid petroleum reserves, Phillips' $62/share tag equates to about $5.15 bbl.—much cheaper than drilling and in line with earlier mega-merger price factors. But with depressed oil markets, whatever deals arise won't be easily completed.

• TRENDS

Emasculation of DOE: No Czars for Reagan

There was a time when it must have seemed that the Department of Energy would be a permanent nightmare for marketers.

From humble beginnings as a sub-cabinet level agency created by President Gerald Ford in the wake of the 1973 oil embargo, it mushroomed into a full-fledged cabinet department that seemed to grow daily in size and power. The post of Energy Secretary was a high-visibility job, with plenty of prestige and air-time on the nightly news. The first energy secretary, James Schlesinger, put DOE on a par with the State and Defense Departments, in fact.

Since 1980, oil industry trends and a new executive philosophy in the White House have reversed the momentum toward a larger federal presence in the petroleum marketplace. James Edwards, the former governor of South Carolina who came to Washington for the express purpose of dismantling DOE, left without accomplishing his goal (although oil decontrol left DOE with a far less important stature).

The Reagan administration's second energy czar was Donald Hodel, a career bureaucrat from the Interior Department. In the strange pecking order in Washington, that was a clear signal that DOE no longer had been demoted to a second-rate agency, on a par with, say, Housing and Urban Development.

Late last year, DOE quietly slipped a little further, when Hodel left DOE to take over the top spot at Interior. Just a few years ago, no Energy czar would have considered going to Interior, as Hodel did. It would have been too big a demotion. By appointing White House personnel chief John Herrington to replace Hodel, the Reagan administration made it clear that if DOE can't be abolished, it *can* be ignored.

Nobody outside the White House seems much interested in DOE either. At Herrington's confirmation hearing in late January, only the incoming secretary and one other witness testified. The other witness, Robert Alvarez of the Environmental Policy Council, said he wasn't prepared to comment on Herrington's nomination, he just wanted to discuss general energy policy. For his part, Herrington promised to be "more than just a caretaker," but conceded he's going to need some on-the-job training.

Of course, there still is talk about somehow abolishing DOE. The latest wrinkle involves a merger between the Energy and Interior Departments. Under this arrangement, there would be an Energy and Interior Secretary and two second-level posts for each area.

Most congressional sources, though, don't think that will happen. For one, Congress will be too busy pursuing deficit reduction and tax reform matters to attend to nonessential cabinet reorganizing. Second, an entire network of congressional committees has been developed over the years to oversee the operation of DOE. That means scores of House members and their staffers have a vested interest in supporting, not undermining, a big DOE.

What eventually happens to DOE probably won't mean much to marketers in the short term. The only activities at DOE that really interest marketers now are the overcharge cases (which are finally winding down) and perhaps the Strategic Petroleum Reserve (which may be turned over to a private operator).

To use an old cliche, DOE is at a crossroad. Which path the department takes could have some long-term consequences for the petroleum industry. If things continue the way they're headed, DOE probably will become a repository for senior bureaucrats—a perfect job for a personnel man.

On the other hand, DOE could become a very important agency by fostering the planning and research that could prevent the economic and social upheaval that would surely accompany another "energy crisis." There is clearly a need for research, in particular.

Right now, of course, there is plenty of crude oil and product prices are far lower than anyone ever expected. But nobody believes that will always be the case. A long-term research program could help postpone the day when oil and natural gas become too scarce and too valuable to burn in automobiles and could prepare us for when that day does come.

It doesn't matter what kind of agency handles this unglamorous chore. President Reagan may be right when he argues that we don't need a cabinet level agency to oversee energy policy. The real issue is whether we need an energy policy at all. The path DOE is on today seems to leave that issue in doubt.

—Tom Goldsmith

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

DECEMBER	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.179	$1.109	$1.193	$1.354
Regions:				
Northeast	1.182	1.105	1.182	1.340
North Central	1.177	1.122	1.202	1.386
South	1.160	1.084	1.174	1.331
West	1.205	1.126	1.220	1.400

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	2/1/85	2/3/84
Gasoline (total)	233,499	225,425
Gasoline (unleaded)*	108,811	92,233
Kerosine	35,720	31,116
Distillates	142,821	117,838
Residual	47,635	43,317

**Included in gasoline total.*
Source: American Petroleum Institute.

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NATIONAL PETROLEUM NEWS MARCH 1985

Year-End Earnings Reports Yield Suprises: Exxon, Shell, Standard (Ind.) Set Records

Ironic as it may seem, the year 1984 wound up as the most profitable in history for three of the nation's top oil companies.

This, despite red ink from a glut of product and weakness in prices from coast to coast. Earnings on refining and marketing operations of two of the three were flat, however.

The big winners were Exxon Corp., Standard Oil of Indiana and Shell. Their record-breaking performances almost escaped notice in the year-end summaries of the business and trade press. Except for Exxon, the companies did indicate in their preliminary announcements in early February that earnings had exceeded all past performances.

Exxon reported a 1984 net of nearly $5.53-million, Standard of Indiana reported $2.18-billion, and Shell turned in $1.77-billion.

Exxon's previous all-time high was 1980's report of $5.35-billion. The company originally had reported earnings in excess of $5-billion in 1980, 1981 and 1982, but all three years were scaled down in a restatement of the financial figures in 1982. As a result, both 1981 and 1982 dropped below $5-billion.

In addition to setting a record, this was the first time that Standard of Indiana penetrated the $2-billion/year profit mark. Its prior record was $1.92-billion in 1981.

The company's other distinction was its numbers for refining, marketing and transportation. Standard of Indiana was the only one of the top dozen oil companies to show gains for 1984 over 1983.

Shell earned $1.77-billion last year, beating its old mark of $1.70-billion set in 1980.

Exxon attributed much of its good fortune to upstream and overseas operations —notably an 11% increase in foreign crude oil liftings and the near-tripling of its earnings from worldwide chemical operations. Another reason was the restoration to income of $149-million of deferred tax provisions applicable to undistributed foreign earnings.

Domestically, Exxon said crude production profits increased $146-million in 1984, but refining and marketing operations netted only $161-million, compared with $295-million the preceding year. Gains from increased motor gasoline sales and reduced operating expenses were "more than offset" by the 1984 decline in product realization, said an

Fourth Quarter and Full-Year Earnings

(millions of dollars)

Company	4th Qtr. 1984	4th Qtr. 1983	% Chng.	Full-Yr. 1984	Full-Yr. 1983	% Chng.
Exxon	$1,425.0	$1,618.0	(11.9)	$5,525.0	$4,978.0	11.0
Mobil	286.0	447.0	(36.0)	1,270.0	1,503.0	(15.5)
Texaco (a)	(552.0)	256.0	—	306.0	1,233.0	(75.2)
Stand. Ind.	465.0	459.0	1.3	2,183.0	1,868.0	16.9
Chevron	434.0	403.0	7.7	1,534.0	1,590.0	(3.5)
Atl. Richfield (b)	285.0	419.0	(32.0)	367.0	1,348.0	(83.4)
Shell	580.8	549.0	5.8	1,772.0	1,633.0	8.5
Gulf (c)	—	—	—	—	—	—
Tenneco (f)	130.0	241.0	(46.1)	631.0	716.0	(11.9)
Stand. Ohio	290.0	324.0	(10.5)	1,488.0	1,512.0	(1.6)
Phillips	169.0	247.0	(31.6)	810.0	721.0	12.3
Sun	136.0	61.0	123.0	538.0	453.0	18.8
Getty (d)	—	—	—	—	—	—
Union	153.4	178.0	(13.8)	700.4	625.9	11.9
Amer. Hess	(4.9)	57.0	—	170.5	205.3	(17.0)
Dia. Shamrock	56.8	(130.0)	—	242.2	(56.2)	—
Ashland (e)	25.9	27.2	(4.8)	—	—	—
Kerr-McGee	(35)	17	—	65	118	45
Pennzoil	(49.4)	57.7	—	130.5	164.2	(20.5)
Murphy	20.9	19.4	7.7	96.1	127.4	(24.6)
Amer. Petrofina	17.3	23.4	(26.1)	45.1	55.3	(18.4)

(a) Includes 4th quarter writeoff of $765-[illegible]lion; (b) Includes one-time writeoff of $765-million; (c) Included in Chevron report; (d) Included in Texaco report; (e) First quarter '85, fiscal ends 9/85; (f) Corporate return which includes Tenneco Oil Co.

Refining and Marketing Earnings

(millions of dollars)

	4th Qtr. 1984	4th Qtr. 1983	% Chng.	Full Yr. 1984	Full Yr. 1983	% Chng.
Exxon						
domestic	$ 22	$155	(85.8)	$161	$458	(64.7)
foreign	88	298	(69.9)	192	674	(71.8)
Mobil						
domestic	(10)	44	—	(4)	170	—
foreign	(67)	130	—	30	234	(87.2)
Texaco						
worldwide	(51)	76	—	(308)	(30)	—
Standard (Ind.)						
worldwide	9	42	(78.6)	123	28	439.2
Chevron						
domestic	50	27	(85.2)	(43)	(56)	—
foreign	110	100	1	118	226	(47.8)
Atlant. Richfld.						
domestic	69	167	(58.7)	279	474	(41.1)
Shell						
domestic	65	81	(19.8)	223	238	(6.3)
Standard (Ohio)						
domestic	30	176	(83.0)	200	453	(55.8)
Phillips						
domestic	NA	NA		NA	NA	
Sun						
domestic	10	19	(47.4)	19	37	(48.6)
foreign	(3)	2	—	5	23	(78.3)
Union						
domestic	NA	NA		NA	NA	
Amer. Hess	(59.7)	(17.1)	—	(108.6)	(65.9)	—

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Exxon spokesman.

For its part, Standard Oil of Indiana credited its record corporatewide earnings to "improvement in all of Standard's principal lines of business." Exploration and production earnings were the result of higher volumes, while its chemicals business benefited from both higher production levels and better profit margins, the company said.

Among the top dozen companies' profits from downstream, Standard of Indiana was the only company last year to make substantial strides in year-to-year earnings. Phillips reported downstream to be "up slightly" without citing specific figures, while Chevron at least cut its losses, the companies reported.

Standard's downstream boost was "largely due to the sale of its 80% interest in Amoco Australia" last July, said a company spokesman. Unconfirmed reports at the time put the sale price at more than $50-million. The sale to BP Australia included a 45,000 b/d refinery, seven product terminals and more than 600 stations.

Even accounting for the roughly $50-million asset sale, however, Standard increased downstream earnings from oil two-and-a-half times—from 1983's $28-million to more than $70-million, excluding the Australian deal.

Scoreboard for 1984's Three Record Performers:

(In billions of dollars)

	Exxon	Standard (Ind.)	Shell
1984	$5,525	$2,183	$1,772
1983	4,978	1,868	1,633
1982	4,186*	1,826	1,610
1981	4,826*	1,928	1,700
1980	5,350*	1,915	1,500
1979	4,925	1,507	1,125

*Before restatement, Exxon reported earnings of $5,650 in 1980 and $5,565 in 1981 and reduced its 1982 totals as well.

In addition, the company enjoyed increased profits from the sale of certain domestic assets of its chemicals operations, on top of already healthy earnings from that corner of Standard's operations.

Like Standard and Exxon, Shell also cited a near-doubling of its chemical profits as one of its high roads to success in 1984.

"Earnings benefited from increased volume in product sales and in crude oil and natural gas production," the company stated. "Additional positive factors were reduced interest expenses, greater interest income, and fourth-quarter tax provision adjustments applicable to prior years. Together, these factors more than offset the negative impacts of higher writeoffs and lower refined product margins."

—J. Richard Shaner

Is Crude ROI Stemming Majors' New Investment Units?

The shaky and fast-crumbling world crude oil price situation might be bringing some relief for private-branders and others from tough major brand street competition.

In late January, when the Organization of Petroleum Exporting Countries (OPEC) wound up another "crisis" meeting in apparent disarray, there were indications in a few markets that certain majors had become slightly "less aggressive" with their pump prices.

In addition, according to field reports, at least one major (Texaco) has apparently cut back on capital expenditures for marketing. One distributor says he was told in December that Texaco had "frozen" further capital spending. Another said he was told by a Texaco sales manager that the company didn't have any money left for 1985 for building many of its "System 2000" units, which in 1983 helped Texaco reverse an eight-year slide in national market share.

Some sources believed the Texaco spending cutbacks, if true, were due primarily to the expenses it incurred in acquiring Getty Oil some months back. Others, however, believe that sinking crude oil prices (and, hence, revenues from production) are causing Texaco and some other major companies to take a closer look at their marketing expenses.

Whatever the reason or reasons, some field reports indicate that in a few markets, price "spreads" were beginning to appear once again between branded and unbranded pump prices in some markets.

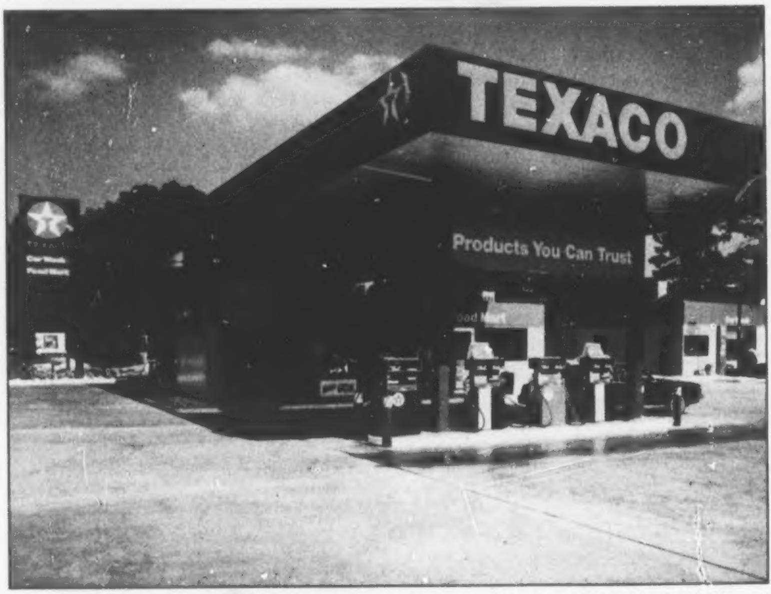
According to these reports, some major brand outlets were showing an increasing tendency to allow non-major competitors to post pump prices from 1¢ to 2¢ gal. below them. In other cases, some independents said they were noticing that some major-brand stations were becoming slower in meeting downward market moves at retail.

Almost since the end of federal controls in early 1981, says one large chain retailer, "there has been almost a knee-jerk reaction by major dealers and major company-operated stations to move within the hour to meet a lower posting. They are not reacting nearly as fast now at the company stations, and we find some dealers are willing to 'spot' us a penny or two."

Such differentials have been noted recently particularly in the Southwest and, at times, they include company-operated retail outlets.

While some majors may be softening their stance, though, some field reports indicate that not all are.

Texaco and Mobil dealers don't seem to be "quite as aggressive" in the Southwest, says one private-brander. In the Southeast, however, another finds companies like Amoco "just as tough as ever."

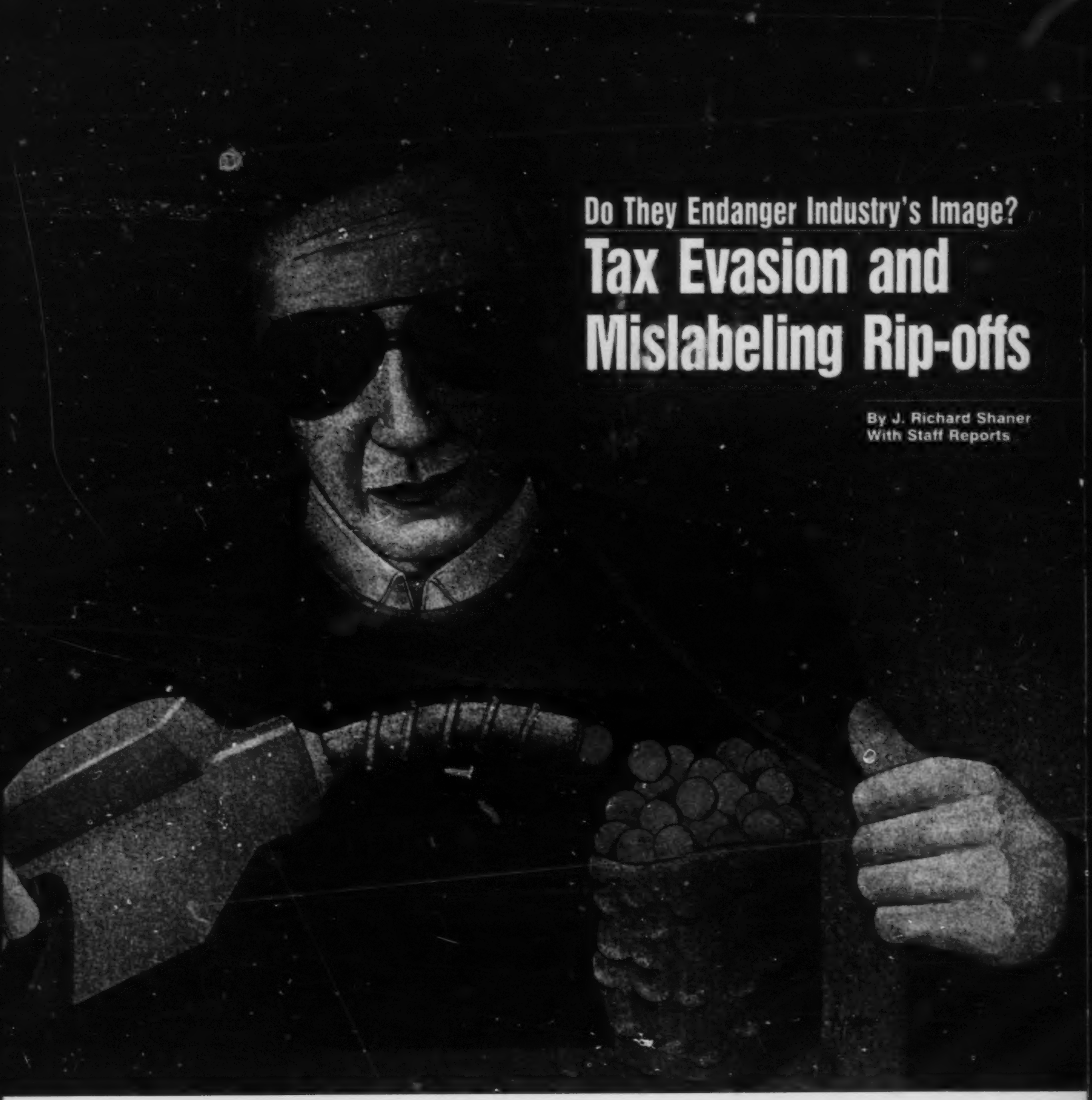


Reports say Texaco has frozen spending for expansion and System 2000 units. Are falling oil revenues forcing majors into tougher money policies and less aggressive pricing?

Do They Endanger Industry's Image?

Tax Evasion and Mislabeling Rip-offs

By J. Richard Shaner
With Staff Reports



It's not that serious a problem yet but there is concern that some unethical marketing practices could rapidly become more widespread, crucifying even legitimate marketers and perhaps damaging the entire industry's image.

What practices?

Blatant tax evasion. Commingling of brands and grades. Bootlegging product. Shortchanging octane numbers. Misrepresenting non-taxable distillates as transportation diesel.

These shenanigans and more, say market sources, are on the increase in a few parts of the country by unscrupulous and/or desperate people out to make a fast buck at the expense of other marketers and government revenue.

In some instances, like in New York City, the alleged practices have come under the glare of the national news media spotlight. Meanwhile, marketers trying to "do right" in such areas often find they are being undersold by 5¢ to 10¢ gal. or more.

Some chiseling on taxes and the other alleged wrongdoings are nothing new to petroleum marketing. From time to time, such things have been uncovered on a small scale.

But there is concern that the present situation could quickly get out of hand, spreading across the country and perhaps leading to such things as:

—The loss of jobbers' tax collection and remittance responsibilities and, consequently, cash "float" and credit line assets such things bring.

—A deterioration of price structures, which would force more ethical marketers either to join the crowd or fold their tents.

—A crackdown by taxing authorities, which could be costly and time-consuming to even ethical marketers as books are audited and examined.

"Lord knows, it's difficult enough now for marketers to compete against each other without this sort of thing," notes Gerry Schanke, marketing director of the American Petroleum Institute. "Every ethical marketer wants to see the appropriate laws enforced and the violators ferreted out and penalized. Of even greater worry than the tax evasion cases though,

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Lead, Octane Violations Trouble NYC, EPA and Majors

Sporadic notices from New York City's Department of Consumer Affairs and from the U.S. Environmental Protection Agency confirm the "rotten apple in the bushel" aspect of gasoline marketing in the nation's largest city.

In January, the consumer affairs agency announced that it had uncovered 133 violations by service stations in the selling of gasolines whose octane numbers were inferior to those posted on the pumps, (as required by law) and/or the selling of leaded gasoline as unleaded.

The interesting part of it all was that the city inspectors were not looking specifically for such violations. Their main focus was on the station's pumps, hoses and nozzles, and meter accuracy.

In like vein, EPA announced late last fall that it had issued violation notices to 24 companies in the New York City area for allegedly selling leaded gasoline as unleaded. The agency said it discovered the violations when it inspected gasolines at 204 retail stations. In all, 29 actions were taken against the 24 companies which included refiners, distributors and retailers.

EPA said it made some inspections in response to tips from people who said they had personal knowledge of instances where leaded gasoline was fed into unleaded gasoline storage tanks.

Penalties for the EPA violations are negotiable, but in the event settlements can't be reached, the cases are referred to the Justice Department. New York City penalties range up to $500 per violation, but typical fines are more like $275 to $375 for first offenses.

New York City's service station population runs somewhere between 1,800 and 2,000 units. Each, according to the city, is inspected at least once a year by a team of at least five field inspectors, depending on the conditions.

Part of the inspection is to draw samples from each pump and compare them with master specimens provided by the supplying company, usually the majors. Where the slightest variation in color or anything else makes an inspector suspicious, the sample is sent to a private testing laboratory for analysis.

The city says it found 103 cases where the octane numbers of the gasolines were inferior to the pump postings, and 33 instances where what was supposed to be unleaded gasoline had lead content far in excess of EPA regulations. EPA tolerates .05 grams/gal. in unleaded fuel and 1.10 grams/gal. in leaded fuel.

Probably the worst was that of a Bronx station which was cited twice—three weeks apart—for selling 87.2 octane gasoline when the pump face indicated it should have been 93.

The leaded violations ran as high as 2.13 grams/gal. at one station, versus an allowable of .05 grams/gal. Another pump at that same station had 1.52 grams/gal. of leaded gasoline in an .05 grams/gal. dispenser.

Naming Names

The city pulled no punches in its violation announcements. It named names, companies and street addresses, as well as the dates of violation. Thus, where octane deficiencies were concerned, it said Amoco stations had 36 notices, with seven outlets accounting for almost half of them; Sunoco, 3; Power Test, 3; Texaco, 5; Getty, 19; Mobil, 4; Gulf, 2; Chevron, 4; and unbranded, 27.

Lead violations amounted to 23 for unbranded stations; Sunoco, 1; Power Test, 2; Getty, 1; Texaco, 2; Gulf, 1; Chevron, 3.

Spokesmen for the oil companies agreed that there are a lot of things going on in New York that are just about out of control and that "there are human errors in transportation, storage, inadvertent adulteration, etc." They all said that they keep close tabs on every station and crack down immediately where warranted. "But it's a tough, tough job," said one.

So concerned is Amoco about the quality of its unleaded gasolines in the New York City marketplace that it has put its own testing vehicle in the field to spot-check its retailers on octane numbers and any sign of lead contamination.

"We've taken more than 1,000 samples so far, and in recent months we've already sent cancellation notices to a dozen retailers suspected of selling other than Amoco gasoline via an Amoco brand dispenser," said Richard Foxx, eastern director of public and government affairs.

"We keep a very close track on our product from the rack to the individual retailer, both by batch number and continuous cross-checks," he added. "So, we know immediately when a gasoline doesn't measure up to specifications that it isn't ours."

Foxx, like other supplier spokesmen, said it was "tough" under the Petroleum Marketing Practices Act to terminate a dealer. But procedural steps are invoked swiftly to cope with any situation.

Job Gibbs, eastern marketing director, said Amoco was especially concerned because New York City had issued 36 octane number violations against its stations in 1984. "We have possibly the highest octane number in the New York market," he said, "and we're very concerned when this prestige factor is affected."

Shell is also concerned, and bought ads in metro-area newspapers promising that its stations "protected" motorists against bootleg gasoline [See page 42].

A few major companies have remained untouched in the investigation, and a spokesman for the city said it was "a fair and correct assumption" that no fuel adulteration violations had been found at those suppliers' stations.

are those involving adulteration of gasoline. This could cause a loss of public confidence in a product that the industry has always been very meticulous about."

The Hot Spots

Except for the misrepresenting of diesel fuel for tax evasion purposes, which reports indicate can occur almost anywhere, there are just a few hot spots of concern at present.

These are the metropolitan New York area, parts of Florida, southern California and the Chicago area. In addition, there are certain "border zone" cities and towns along some state lines that traditionally have had "problems."

In these areas, according to local marketers and taxing authorities, some fast-buck artists could be evading hundreds of millions of dollars in taxes. Some sources put annual tax losses in some states as high as $500-million. In addition, according to allegations in New York, motorists there in many cases may be paying for higher quality gasoline than is being pumped into their tanks.

There are even reports that the Mafia may be involved in some of the alleged illegal practices in Florida and New York.

New York City, by far, is considered to have the worst problem at present and it is the area currently getting the most general media attention.

But in Florida, where state tax officials have estimated that losses from petroleum products tax evasion could range anywhere from $15-million to $200-million a year, a multi-pronged investigation is underway. Industry officials, who tipped off the state that some evasion might be occurring, believe a lower figure is more accurate.

Florida Petroleum Marketers Assn. (FPMA) exec Carl Adams recently sought and obtained Florida television time to rebut the station's earlier allegations that the state was losing from $40-million to $20-million from a tax collection system that "invites dishonesty." Adams contended the system is fine, so long as its laws are enforced. He says actual tax losses were about $8-million before the system caught up with "members of organized crime."

Charges are heard that evasion of state sales taxes (not federal and state excise taxes) also has been growing in southern California. Paul T. Erdos, executive director of the Serve Yourself & Multiple Pump Assn., (SYMPA) believes the state is losing as much as $200-million annually.

Chicago, which has had problems in the past with allegations of both tax evasion and misrepresentation of product, may have opened the door once more for such activity by imposing a 7¢ gal. tax on leaded gasoline sales last Jan. 1. [See story on page 22.]

AMOCO
Amoco®
quality control patrol
Amoco Oil Co.

Amoco's inspection van prowls New York, making spot quality checks on its dealers.

Other than these large markets, sources believe the biggest tax evasion problems at present involve diesel fuel. A number of marketers around the country say they often suspect that their competition, via various maneuvers, classify diesel fuel which they sell to commercial or similar end-user customers as farm diesel or home heating oil.

The "diesel switching" problem is becoming one of increasing concern, says Phil Chisholm, executive vice president of the Petroleum Marketers Assn. of America. He says it's causing more discussion of perhaps using a dye in home heating oil to help at least partially correct the situation.

Florida Investigations

According to several sources, the most elaborate and sophisticated tax cheating and product misrepresentation is going on in metropolitan New York. Some say, however, that an example of what's happening now in the Big Apple began earlier in Florida, and that there is an organized crime connection with both the Florida and New York activity [*NPN*—Feb. '85, p20].

Florida's Department of Law Enforcement has been looking into tax evasion allegations since August 1983, when it was first tipped off by FPMA about such possible activity.

This tip led to the audit of one firm which, in turn, led to audits of a half dozen more and the filing of jeopardy assessments against them and others. At least three persons had been arrested for alleged tax evasion wrongdoing in Florida by mid-January. In addition, the state is in the process of re-auditing the returns of more than 400 licensed petroleum distributors. The state authorities concede that only a handful appear to be involved in a "scam" which apparently got underway two years ago.

"I don't want to sound like 'The Godfather,' but this is organized crime," testified Commissioner Robert Dempsey of Florida's Department of Law Enforcement at a state house subcommittee hearing. "We have definitely traced it to the Colombo family operating in New York and New Jersey. They had this well worked out before they got to Florida. We were fortunate that we got to it early."

In fact, one of the key men in the greater New York violations was also a principal in the Florida gambit. He is now being held in protective custody by federal authorities in New York in exchange for cooperating with investigators.

Dempsey said one of the principals was a man named Lawrence Iorizzo, who previously had been convicted in New York state of defrauding $1.1-million up there. Iorizzo is the man being held in protective custody by federal officials in New York and allegedly is one of the gangland links.

In Florida, wholesalers collect the federal and state taxes on a first-sale basis. The suspect companies, it was alleged, under-reported sales or falsified reports or simply pocketed the money, closed shop and disappeared. FPMA's Carl Adams says "there is evidence that no more than five or six companies are involved . . . Most of these are Panamian corporations apparently set up by out-of-staters for the purpose of tax evasion."

Adams said the unfortunate part of it was that ethical distributors and retailers were being smeared unjustifiably by the actions of the evaders. He noted that Florida's laws were very tough, but "when organized criminals set out to break the law, they usually succeed to some degree before the legal system can stop them." The net effect of the negative publicity, however, is that it might "make all of us look like a bunch of thieves," he was quoted as saying.

State tax officials said they are planning to strengthen the penalty provisions of current laws, restructure the licensing procedures, increase the statutory maximums for required bonds and institute a new policy that no licenses will be granted until an on-site inspection verifies storage capabilities and businesslike operations.

They and industry officials are hopeful that the current mess can be cleaned up before the year is out.

The Big Apple Mess

There are indications that metropolitan New York may have far greater problems of both tax evasion and product misrepresentation than Florida has.

A number of distributors and retailers have been arrested in the metropolitan New York area so far. The most recent one was a Long Island marketer who was indicted by a federal grand jury in Brooklyn in January for evasion of $750,000 in gasoline taxes—the federal government's 9¢ worth. This was the first time that any marketer has been nailed on a federal evasion charge, even though there have been allegations that the bootlegging network has been guilty of that too.

Last summer, one Long Island retailer was accused of ducking $600,000 worth of taxes, of defaulting in the payment of 70 tankloads of gasoline from New Jersey suppliers, of closing his 14 stations when things got hot, and of selling out his product to all comers at half price.

Another allegedly evaded payment of $1.1-million in taxes on 1.3-million gal. of gasoline in June 1983 and 4.3-million gal. the following month.

Shortly before Christmas, New York State held a widely publicized press conference at which the state tax commission announced that it had moved on 18 distributors accused of evading taxes, had sent out tax bills to 17 distributors totaling more than $33-million, and had referred the files on 18 distributors to the state attorney general for possible prosecution on evasion, falsified reports and fraud charges [*NPN*—Feb. '85, p20]. No names were released nor was it made clear whether there were more than 50 distributors involved or merely 18 or so at this time. The tax commission said it also was moving to vacate the distributor licenses of 161 motor fuel distributors that appeared to be inactive or dummy corporations in 1984.

No one knows how many casualties there have been in the metropolitan New York marketplace so far—how many legitimate distributors and retailers have been forced out of business either by the economics or their unwillingness to go along with a dirty side of gasoline marketing.

But industry people say a lot of ethical marketers are being hurt badly, and with excesses of gasoline and diesel fuel all over the place, the year 1985 could bring many of them to their knees.

One Long Island retailer, for example, said he tried to compete without buying bootlegged product and "I lost $7,000 in one month . . . I couldn't compete with the guy next door unless I got some myself." Another said he got 100,000 gal./month from his supplier and 30,600 gal./month from a bootlegger. "I was losing 5¢ on the major product but making 8¢ on the bootleg stuff, so I was coming out about even," he was quoted as saying.

It's not only the little guys that are hurting, either.

Leo Liebowitz, president of Power Test Corp. (which recently won federal approval to buy the Getty East Coast marketing chain from Texaco), said he did not have as good of a year in 1984 as he should have. He blamed virtually all of the profit decrease on marketplace losses reflecting competition from the bootleg gasoline business.

Similarly, Northville Industries Corp., one of the biggest terminals on Long Island, is feeling the pressure too. Specifically, a company executive said Northville and two other terminals used to do about 400,000 gal. month of gasoline. "I'll bet we're not doing more than 50,000 gal. monthly now among the three of us," he said.

A spokesman for one of the larger oil companies said privately that "if we really cracked down on commingling, we'd lose half of our outlets on Long Island."

Amoco is so concerned about its reputation and octane prestige that it has its own inspection van prowling the New York streets and spot-checking stations for inferior product. A spokesman said a dozen contracts have been terminated in recent months alone.

For example, New York City said it churned up 133 violations in 1984 in the misrepresentation (short-changing) of octane levels and the selling of leaded gasoline for unleaded gasoline—even though it wasn't specifically looking for these activities. [See related story on page 39.]

The Environmental Protection Agency said it found 29 cases of stations selling leaded gasoline as unleaded in New York City last fall.

There are national implications too.

An EPA attorney, for example, said that in fiscal 1984, which ended last Sept. 30, the agency issued about 550 citations against distributors and service stations for allegedly illegal gasoline sales. About half, he said, were for contamination or adulteration of product.

The contamination, he said, could have been the result of sloppy handling procedures or inadvertent loadings. But some were for selling leaded gasoline as unleaded, pure and simple.

In the last three months of 1984, about 100 or so additional citations were issued. "So, it looks like we'll have about the same number this year," said the attorney. EPA monitors about 10,000 stations per year, out of the 130,000 to 140,000 in business, looking not only for contamination but also fuel switching, adulteration, nozzle aberrations and fill tank entrances.

State Motor Fuel Taxes

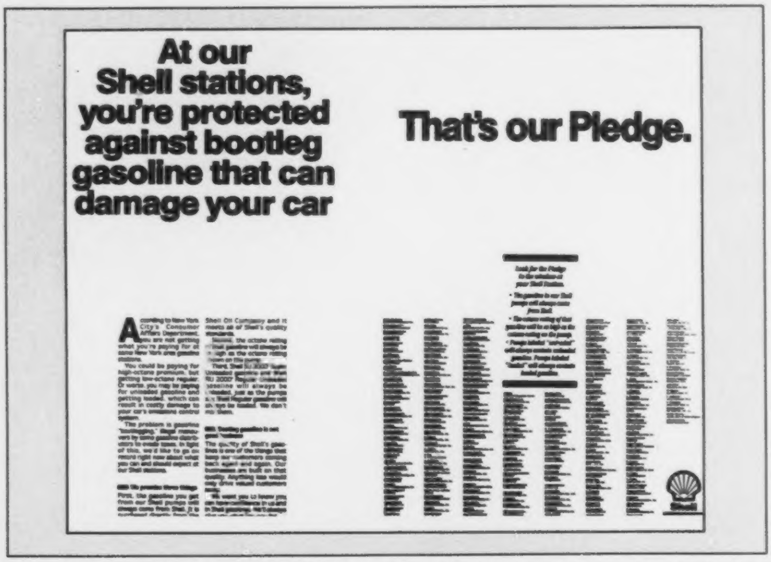
(¢ per gal., as of 1/1/85)

	GASOLINE	DIESEL	GASOHOL	ADDED TAX (Percent)	LOCAL OPTION
Alabama	13¢	14¢	10¢		L
Alaska	8	8	0		
Arizona	13	13	13		
Arkansas	9.5	10.5	0	4	
California	9	9	9	4.75	L
Colorado	12	13	7		
Connecticut	15	15	14	2	
Delaware	11	11	11		
D.C.	*15.5	15.5	15.5		
Florida	* 9.7	9.7	5.7		L
Georgia	7.5	7.5	7.5	3	
Hawaii	8.5	8.5	8.5	4	L
Idaho	14.5	14.5	10.5		
Illinois	12	14.5	12	6(a)	L
Indiana	*11.1	11.1	11.1	5	
Iowa	13	15.5	11		
Kansas	11	13	6		
Kentucky	*10	10	6.5		
Louisiana	16	16	0		
Maine	14	14	14		
Maryland	*13.5	13.5	10.5		
Massachusetts	*11	11	11		
Michigan	*15	15	11	4	
Minnesota	17	17	15		
Mississippi	9	10	9	6	L
Missouri	7	7	7		
Montana	15	17	8		
Nebraska	*14.7	14.7	9.9		
Nevada	12	12	11		L
New Hampshire	14	14	14		
New Jersey	8	8	8		
New Mexico	*11	11	0		
New York	8	10	8	6.75	L
N. Carolina	12.25	12.25	7.25		
N. Dakota	13	13	8		
Ohio	*12	12	8.5		
Oklahoma	9	9	9		
Oregon	9	9	9		L
Pennsylvania	12	12	12	6	
Rhode Island	*13	13	13	1	
S. Carolina	13	13	13		
S. Dakota	13	13	9		L
Tennessee	10	13	6		L
Texas	10	10	0		
Utah	14	14	14		
Vermont	13	14	13		
Virginia	*13.63	13.63	5.63		L
Washington	18	18	16.2		
W. Virginia	*15.35	15.35	15.35		
Wisconsin	16	16	16		
Wyoming	8	8	8		

*Variable tax expressed in cents per gallon.
(a) Chicago levied 7¢ gal leaded gasoline tax on 1/1/85.
Source: National Highway Users Federation.

"We regard any violation as serious," he said, "but we do not regard the problems of contamination and adulteration as pervasive right now. It's only about 1% nationally compared with New York's 6%."

Most of New York's agonies are in the metropolitan New York City area, from the Hudson river separating it from northern New Jersey to Montauk Point, at the tip of Long Island 130 miles to the east. Similarly, Florida's headaches are in the southern part of the state, Illinois's are primarily in Cook County and Chicago, and California's in metropolitan Los Angeles.



At our Shell stations, you're protected against bootleg gasoline that can damage your car

That's our Pledge.

When New York City's Department of Consumer Affairs issued a report on motor fuel adulteration, Shell bought $500,000 worth of newspaper ads promising only 'Shell-quality' gasolines, accurate and reliable octane ratings, and the right products in the right pumps.

Empire State Shuffle

New York's problem dates back basically to September 1982, when the state, in some hastily improvised laws, shifted the gasoline tax collection burden from the backs of 10,000 retailers to the 400 or so distributors in the state. The theory was that with fewer tax collectors involved, the opportunities to cheat would be minimized and controllable.

The loophole, however, was that the gasoline taxes would not be collected until the last distributor moved it into retail or consumer use. This opened the door to a variety of companies—the list of distributors grew rapidly to more than 600—to engage in "daisy chain" sales among themselves. Somewhere along the line, the gasoline would be marked "all taxes paid" and moved into the marketplaces. New York's gasoline taxes are around 20¢ gal., so this represented a substantial killing for the bootleggers. (New York's taxes include 8¢ gal. excise, plus state and local sales taxes, plus a gross receipts tax, plus a 1¢ gal. leaded fuel tax in New York City only.)

An industry summary noted that the "theft profit" in bootlegged gasoline was $2,400 for a 10,000 gal. tank truck or $24,000 for a 100,000 gal. transaction in terminal, barge or pipeline.

Industry spokesmen said 90% of the illicit gasoline came in through the Port of New York. The balance came across the borders, some from New Jersey, where the state tax was only 8¢ gal., and some from Canada.

It was believed most of the gasoline coming in to New York harbor was from overseas tankers, thus making the tracing all the more difficult. An incredible situation was that the Coast Guard had complete records on all ships and cargos but was not allowed to reveal them because of congressionally mandated "right of privacy" laws. State and industry officials still are trying to get some sort of an agreement worked out so that this information would be available not only for the reported cargoes but for all dockings and transfers for tax purposes only.

Some industry people noted that gasoline imports increased significantly in 1984, most of them through New York harbor [*NPN*—Feb. '85, p36]. The American Petroleum Institute, on several occasions, noted that even these figures may not be telling the full story because of reporting and classification difficulties for gasoline and blending components. API said its surveys could be missing from 30,000 b/d to 50,000 b/d as a result. Some in the industry wonder whether similar unreported foreign gasoline was moving clandestinely into the metropolitan marketplace, bypassing not only the state but also the federal government's 9¢ gal. tax.

Once the gasoline was terminaled, however, and moved out via the daisy chains (often only the paper, not the product, changed hands), the paper trail was so tangled that state auditors needed months to trace shipments, often finding that an intermediate company had gone out of business in the interim, breaking the connection.

Participating retailers usually got an "all taxes paid" receipt for the product. The bootlegger would get 10¢ to 13¢, the retailer would end up 7¢ to 10¢ below the market. He usually pocketed most of that and low-balled the streets to move the gallonage.

The situation in the metropolitan area became so bizarre that a CBS nightly news program devoted three special TV reports to the bootlegging. It stressed, among other things, that the blatant commingling of gasolines and the selling of sub-par octanes and adulterated fuels were cheating consumers and jeopardizing their automobiles.

In November 1983, New York Governor Mario Cuomo appointed an industry/government task force to come up with legislative proposals to resolve the situation. [See Sam Borenkind's legal column on page 115.]

It made an interim report last fall and a final report two months ago in which it called for felony penalties, and jail terms and stiff fines against both corporations and individuals convicted of tax evasion and bootlegging. It also proposed that federal and state taxes be paid by the first distributor in the state, or the first importer.

Some distributors, and especially the Empire State Petroleum Assn., instead urged that the taxes be levied against the second distributors so that state inventories would not be jeopardized and that distributors would not be forced to prepay taxes that they might not be able to collect themselves for some time. There also was a question of "float" money.

ESPA renamed its approach a "Combined Audit Proposal" in late January and lobbied vigorously for its adoption, claiming it would correct situations that would not be caught by the master plan. The rest of group supported the first distributor plan, however.

State tax officials and the Governor are anxious to clean up the very messy situation, and corrective legislation is expected this year. State tax officials said they can document evasion losses in excess of $90-million, while industry officials say the total for 1984 more likely is over $200-million.

West Coast Problems

There's one thing that industry and state tax officials agree on in California—a good number of service station operators are not paying the sales tax, which ranges from 6% to 6.5%. There are all sorts of guessing games as to how much this is costing the state in lost revenues. One estimate—the high one—is $200-million.

California has no particular problems with the federal and state gasoline taxes, which are 9¢ gal. each for a total of 18¢. But the sales taxes are something else again.

Paul T. Erdos of SYMPA, which is lobbying for all it's worth in favor of a proposal in the legislature to shift tax-collection responsibilities from retailers to refiners, sums it up this way:

"The tax evasion is unbelievable. There are 15,000 service stations in the state, and to catch the thieves is a problem because of the lack of personnel [in the state offices] to audit them.

"It is known that many marketers buy indie 'gas' from four or five suppliers a month. They may account for only one of them in their filings. The rest they just ignore."

Erdos said there were "800 different ways to evade taxes in California . . . but if you get caught, it's a felony."

Nevertheless, he added, "you can see some marketers with 8¢, 9¢ and 10¢ gal. advantages over the market and law-abiding dealers. You'll even see some of them selling product for as much as 4¢ gal. under what cannot help but be cost."

An authority at the California Board of Equalization, who agreed to comment provided his identity was shielded, responded:

"We're not sure of the volume, but we're aware that some service stations are not paying the full amount of sales taxes.

"We've also been contacted by retailers and refiners. Folks within the retail end are very concerned about unfair competition."

In a running commentary, the state authority said he personally agreed with the idea that prepayment by refiners would pretty well solve the problem of tax evasion. He seemed to feel that the legislature is inclined to think in that direction too.

"We have increased our audit activities and have uncovered the largest amounts, in terms of the absolute potential dollar losses, in the Los Angeles area. But we've also found some problems in the Sacramento area with operators staying in business for only short periods of time. That makes it difficult to get on top of them.

"With our expanded audit procedure, we're tying back purchases to suppliers. The paper chain makes it non-attractive (for retailers) to throw away records as many say they do. The problem is, basically, who are they buying from?

"Our first indication that there was something wrong came as a result of some of our audits. We became aware that there was no indication of certain suppliers in records given to us by service station operators when the suppliers told us they had sold product to them. The 6% sales tax equals about 7¢ gal., based on a $1.20 gal. street price. The 9¢ gal. state tax is paid at the distributor level.

"In three or four audits in one small area, however, we figured there was over $1-million in lost taxes and the amount was increasing continually."

State officials are meeting regularly with industry—suppliers, distributors and retailers alike—to figure out procedures to stop the evasions. Proposals to do so are now being considered by the current legislature.

An offshoot of California's low tax rate is some bootlegging across the border into Nevada. Said one Nevada official who, like the California official, did not want to be identified:

"We know it's happening, but not on a scale large enough to provide funds to investigate further. We have the highest excise tax rate of the surrounding states —12¢ gal. A lot of people are taking trucks across the border, paying the California tax and bringing the product back to Nevada. A lot probably winds up in Las Vegas where the taxes are 17¢ gal., or Reno, 16¢."

For the moment, however, "there's no manpower to investigate the problem, and if it could be investigated, there's a question as to whether the money saved would be worth it."

Chicago Again?

Chicago, which used to be the hotbed of gasoline tax evasion problems in Illinois, seems to be sitting on the edge of another volcano with the imposition of a 7¢ gal. tax on leaded gasoline sales effective last Jan. 1.

The idea behind it was to curb the sale and consumption of leaded gasoline in the city. While it's too early to evaluate the impact, there are those who fear that it certainly is a dazzling tidbit to dangle before interested bootleggers.

The ordinance requires retailers to remit the special tax either through their distributors or on their own. That's quite a doorway for evasion-minded operators.

Chicago's gasoline taxes are the highest in the country: federal, 9¢ gal.; state, 12¢; Cook County, 4¢; sales, 8¢—for a total of 33¢. For those buying leaded gasoline, add another 7¢ for a total of 40¢ gal. Elsewhere in Cook County, taxes are about 1¢ under Chicago, and the surrounding counties are 6¢ below. There have been reports that substantial volumes of Chicago's consumption represent either bootlegged gasoline or gallons purchased across the county line to escape the higher taxes in the city and county.

For the most part, however, Illinois appears to have taken the lead in the fight against gasoline tax frauds. The state's prepaid motor fuel sales tax, now in effect for about two years, not only has been effective but has provided a paper trail that's easy to follow. Prior to enactment of the prepaid sales tax law, Illinois was losing a bundle on unreported sales.

"With Illinois being the highest state around, everybody was taking shots at us," said Bill Deutsch, executive director of the Illinois Petroleum Marketers Assn. "It was tough to compete when someone could take off 3¢, 4¢ or even 5¢ by ducking sales taxes."

Don Woodrick of the Midwest Petroleum Marketers Assn. said his members were taking beatings on the streets in and around Chicago because of the high taxes. "It didn't matter who a dealer might be buying from," said Woodrick. "If the dealer wanted to shave some of his gallonage on his sales tax remittance, he knew there was little chance he'd get caught. Even if he was nailed, some dealers just closed shop and opened another place across town."

Woodrick said the incidence of tax cheating snowballed in Illinois until the prepaid sales tax bill went into effect in mid-1983. How much had the state been losing? The estimates vary from a low of $25-million to a high of $50-million a year.

Michigan, which used to have a troublesome tax evasion problem, enacted a prepaid tax law modeled after Illinois' in January 1984. Michigan tax officials said the new law brought in an additional $1-million in the first four months of 1984 alone from sales in southeastern Michigan, the Detroit area. "And that's not related to any volume increase or price change," a spokesman said.

Stated in reverse, could it have been an indication of the dimensions of the tax evasion problems there?

Border Zone Problems

While the big cities like New York and Los Angeles may have problems on a large scale, marketers in smaller markets often at least suspect some of their competition of tax evasion to get a price advantage on them.

Such suspicions often are raised involving diesel fuel sales to commercial accounts and other end-users on which both the federal tax of 15¢ gal. and state and local taxes are supposed to be collected and remitted to the taxing authorities.

An example of what happens, says a Tennessee marketer, once occurred when he attempted to "get a piece of diesel business" at 0.5¢ gal. over his cost plus freight. He lost it to a competitor who underbid him 5¢ gal. "The only way he could have bid that low was to have shown that diesel as farm diesel when he paid his taxes," says this marketer.

Border towns and cities along state lines have traditionally had so-called "bootlegging" problems, with some marketers based in low-tax states prone to ship product into others with higher tax rates.

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A marketer in doing this would not necessarily violate either state's tax laws, points out a marketer, but he would certainly have a price advantage over his competition in the high-tax state.

Texas taxing authorities say they have had problems in the past with low-priced diesel coming in illegally from Mexico, with some such importers at times not bothering to pay taxes.

Arkansas solved a touchy tax differential problem by setting up border zones wherein its taxes were held to a maximum of 1¢ gal. over adjacent states.

Stricter Enforcement Urged

PMAA recently has been lobbying in Washington for stricter enforcement of federal tax laws in hopes of curtailing some of the tax cheating, says exec Chisholm.

"We believe that 98% of our people are trying to do the right thing, but they are at a real disadvantage because of what no more than perhaps 2% are doing," he says.

PMAA has "visited" with federal agencies, including the Internal Revenue Service, about the tax evasion problems, says Chisholm. "We consider them very serious, and they could get worse as taxes increase," he says.

The Society of Independent Gasoline Marketers of America (SIGMA) is concerned that present tax evasion allegations could lead to laws which would require the collection and remittance of taxes by refiners rather than distributors, says a spokesman. PMAA is also concerned that such a thing could come to pass.

This would hurt jobbers who now profit from the "float time" involved in such collections. The tax money also helps improve their credit lines.

As one marketer explains, a 400,000-gal./month jobber collects approximately $80,000 in taxes if he operates in a state where total taxes amount to 20¢ gal. If his gallonage remains constant month after month, and he remits the tax collections at 15 to 30 day intervals, he improves his "credit line" with his supplier by that amount. In addition, he makes interest money off the tax money while it remains in his hands.

Most ethical jobbers say they don't wish to lose this nor do they wish to see unethical ones strip their hides off in the marketplace with low selling prices gained via illegal means.

There has been a tendency by many marketers in the past to "not squeal" on competitors they suspect of tax evasion or other wrongdoing. This could change, however, if the problems of New York, Florida and elsewhere spread and become greater. Some sources fear this is exactly what will happen unless the situations in those areas are quickly brought under control. **NPN**

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Ultramar's Big U.S. Expansion Plans
Why Calif. Jobber Opts for Big Markets
Quick Lubes Update: Poised for Growth

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What It Means to Oil Marketing

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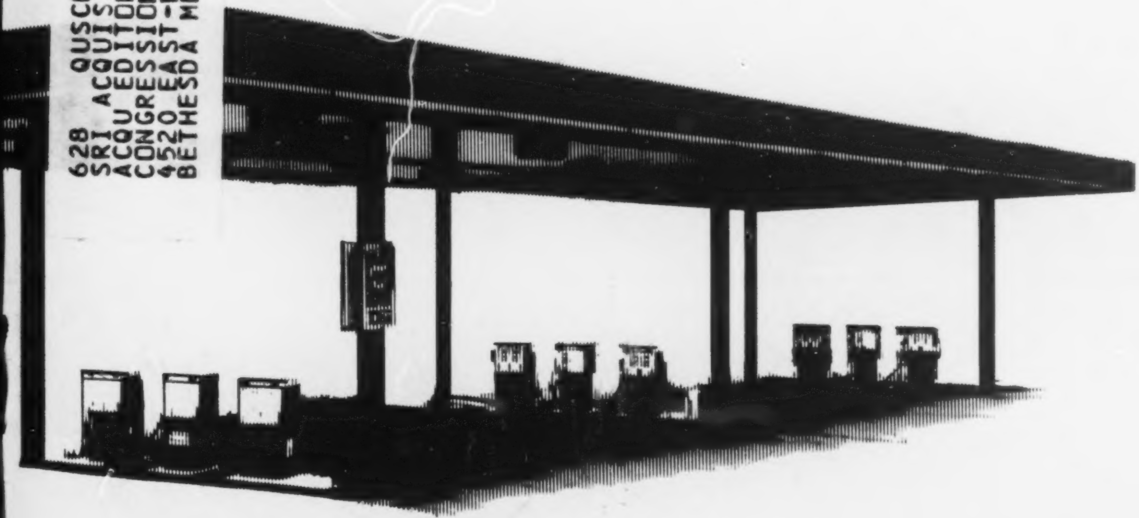

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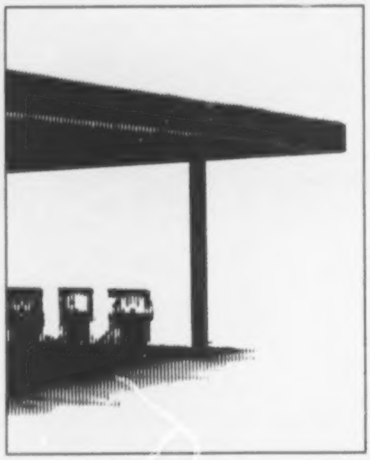


Extreme competition and price-cutting in gasoline markets has spilled over into station rentals—in the form of rent reductions based on gallonage. Thinly disguised to make dealers more aggressive, such formulas are a trend. Page 38

Cover design by Marcus Design, Inc., Chicago; photo by Thomas Olson

While some marketers dispised decontrol, Bob Rinehart says it helped triple his volume since 1981 as he was freed to emphasize marketing again. Page 56

Sleeping son of a British giant, American Ultramar is working hard on a widescale blueprint to plant itself as a formidable motor and heating fuel marketer on East and West Coasts. Page 48

• TRENDS

What's Going on with OPEC? Will Crude Prices Plummet?

The once-mighty Organization of Petroleum Exporting Countries (OPEC) appears to be losing its ability to dictate world crude oil prices. If so, say various analysts, this could lead to uncertainty and possibly chaos in both crude and product pricing in coming months.

The possibility that the OPEC cartel is losing control of pricing has caused some to suggest that the domestic industry might have to be "protected" from "low-cost" foreign oil.

Such talk, last heard in the 1950s and 1960s, might seem unreal, considering the panic days of the 1970s when OPEC seized control of its oil and international pricing, driving prices up ten-fold or more and causing what some economists have since described as the greatest transfer of wealth in the history of the world.

Has OPEC really lost its clout? Can it no longer dictate what the world price for oil will be? Or, is the free market now determining this? If the cartel has lost control, what's likely to happen next?

Most industry analysts who study such things say that OPEC's ability to call the shots on international oil prices has, indeed, been weakened because much more crude is being traded in the "spot" or free market today than in the panic days of the 1970s.

From the early to the late Seventies, when free world demand for oil products was at times exceeding production, probably less than 5% of total world crude sales occurred in the spot market. In addition, the free-trading of this small amount was usually done at prices exceeding OPEC's "official" postings.

Currently, some sources estimate that perhaps from half to two-thirds of the oil sold globally is transferred at "free-market" prices which usually undercut what OPEC says is its official benchmark price.

OPEC has tried to keep control of pricing by jawboning with its 13 member countries to reduce production while also gradually reducing its "official" price. It has also threatened price wars to stop non-cartel member countries from getting too greedy over market share. None of this has seemed to work very well so far.

Some analysts now paint OPEC as a somewhat toothless tiger in the international jungle of oil pricing. Indeed, some of its own members seem to think so. The poetic oil minister of the United Arab Emirates, Manei Saeed al Otaiba, says the cartel, "after the days of luxury, has become a lamb in the midst of the jungle." Like a gang, he says, "the wolves of the market swirl around us."

One of his colleagues, however, Saudi Arabia's smooth and poised Harvard-educated minister, Ahmad Zaki Yamani, has indicated a willingness to do a little jungle fighting, if necessary. The Saudis, suggests Yamani, may start a little price war as "shock therapy" to bring back some "discipline" among both members and non-members of the cartel.

Just how much weaker, financially, the OPEC cartel may be at the present time as compared to its heyday of the 1970s is open to speculation. One analyst, Marion B. Stewart of Andover, Conn., suggests that others who believe the cartel members are in dire financial straits may be wrong. The U.S. dollar's strength, writes Stewart in a newsletter he publishes, *Stewart Energy Outlook*, has given the cartel "the financial muscle needed to sustain a long period of reduced oil demand."

Although nearly half of OPEC's productive capacity is currently shut down as part of its effort to shore up prices, writes Stewart, the OPEC countries' real revenues are "higher than they were six years ago" before their last sharp boost in their "official" prices.

Even with the strong dollar, though, the cartel members have seen their oil revenues plummet since 1981. According to some estimates, OPEC's total oil income shrunk nearly $100-billion between 1981 and 1984, or more than one-third its total 1981 revenues of $247.6-billion.

That's quite a bit of change to lose, even for OPEC, so most analysts think Saudi Arabia's Yamani probably isn't bluffing with his price war threats. If he should try his "shock therapy," some analysts say they wouldn't be surprised to see oil prices drop as low as $10 bbl. in the chaos that would result. —*Marvin Reid*

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

JANUARY	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.145	$1.060	$1.148	$1.304
Regions:				
Northeast	1.170	1.080	1.157	1.297
North Central	1.130	1.063	1.148	1.298
South	1.132	1.040	1.130	1.303
West	1.155	1.066	1.164	1.322

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	3/1/85	3/2/84
Gasoline (total)	226,807	235,579
Gasoline (unleaded)*	107,394	97,284
Jet Kerosine	34,755	33,179
Distillates	123,288	129,550
Residual	47,079	52,382

**Included in gasoline total.*
Source: American Petroleum Institute.

they're a big company," says one jobber. Another chose to go indepependent rather than deal with Texaco. "I just didn't like their attitude and they seemed to be dragging their feet a little too," says the marketer, who's been buying from area brokers at the lowest prices since last August.

He claims that he can buy Texaco product from the brokers at 1.5¢ gal. less than buying from Texaco direct.

Colorado Petroleum Marketers Assn. president Don Morrison waxes philosophical over the Getty to Texaco transition. "Nobody's ever comfortable with change, and I'm sure some will lose out and some will come out ahead. It's just especially tough when you lose a good supplier."

By Dan Larson

MIDWEST

Iowa Markets Deemed Fertile Enough For Suppliers to Seek Getty Jobbers

With the nation's attention sharply focused on the plight of America's farmers, jobbers attending the Petroleum Marketers of Iowa convention in February were encouraged to hear that all was not bleak for their farm customers.

Jobbers affected by the Texaco/Getty merger also found themselves being wooed by not only Texaco but a few other suppliers looking to make inroads into the Iowa motor fuel market.

PMI officials were jubilant over the record 1,300 attendance for this year's convention and trade show. Next year's promises to be even bigger when it is moved to a new show arena. Space restrictions at the Marriott limited the number of exhibitors to 57, and 20 companies were turned away, PMI officials said.

Earl Butz, Secretary of Agriculture under Presidents Nixon and Ford, told the convention that while the news media has spotlighted the plight of farmers facing bankruptcy, the majority of farmers in America are doing as well as ever.

He prefers that the country move toward "a market-oriented program for farmers," with minimum use of crop set-aside programs. "Either we become competitive and move toward market-oriented prices, or we shrink our (agricultural) production plant back to our domestic market," he said. The overflow crowd attending the speech gave the outspoken Butz a resounding ovation at the conclusion of his remarks.

"That man really knows what it's like out here," commented one rural Iowa jobber at the conclusion of Butz's speech. "It's business as usual with my farm customers. My deliveries haven't slowed down, and I'm still giving them the usual 30 days credit," he said.

Another farm jobber however, was not so optimistic. "Sure, some (farmers) are having problems, and it's affected the way I do business with them. I had no choice but to go to c.o.d. I've had some difficulty with collections in the past few months, so what else could I do?" he said.

The fact that a variety of supplier companies are interested in Iowa was clear from the well-attended brand meetings and lavish hospitality suites.

Marketing reps from Texaco sought to soothe concern about supply contracts for Getty jobbers and to make brand transitions go as smoothly as possible. Most Getty jobbers were said to be taking advantage of Texaco's March 1 deadline for supply contracts being offered.

In addition, Citgo Petroleum reps were targeting some 20 Getty jobbers with a sales pitch that involved free paint and signage for an indefinite amount of time. A sales rep for the Southland Corp. unit said Citgo was looking to make a comeback as a branded supplier in Iowa after an absence of more than 10 years.

Union Oil, Koch Fuels and Western Petroleum also were frequently mentioned as suppliers actively courting Iowa Getty jobbers.

The general mood at the convention was decidedly upbeat and jobbers seemed to be pleased with their role as sought-after customers. "It's kind of nice to be the center of all this attention," commented one formerly-unbranded jobber who recently signed up with a new supplier.

Most Ohio jobbers favor below-cost selling bill: survey

Legislation banning below-cost sales would be supported by nearly 75% of the oil jobbers in Ohio, according to a recent membership survey by the Ohio Petroleum Marketers Association.

According to the OPMA survey, not only do 73% of the state's jobbers favor legislation prohibiting below-cost selling, 43% feel such legislation should get top priority of the nine jobber-oriented issues covered in the survey.

Conducted during November and December 1984, the OPMA survey generated 115 responses, slightly more than half the total OPMA membership. Respondents were classified on the basis of annual volume as either small (5-million gal./yr. or less), 31.2% of total surveyed; medium (5- to 10-million gal./yr.), 39.4%; or large (10-million gal./yr. or more), 29.4%.

The issues covered in the survey tended to overlap somewhat, but included most of those of prime importance to the marketer: below-cost selling, minimum markup, divorcement, divestiture, refiner direct-operations, open supply, alcohol labeling on manifests and pumps, repeal of alcohol fuel tax exemptions, and a free market approach to industry problems.

Issue	**Favor**	**Oppose**
Below-Cost	73.4%	13.8%
Alcohol Labeling	71.6	11.0
Minimum Markup	56.0	19.3
Divorcement	54.1	21.1
Divestiture	52.2	28.4
Repeal Alcohol Fuel Tax Credits	50.5	26.6
Limit Refiner Direct-Operations	41.3	27.5
Free Market	41.3	33.0
Open Supply	37.6	36.7

Note: some respondents were undecided—percentages do not total 100%.

The survey questionnaire defined below-cost selling as offering a product at retail for a price that is less than the cost of doing business. It cited Alabama's below-cost selling law as an example.

Minimum markup legislation, on the other hand, was defined as a specific percentage added to the cost of a product, and could be applied to both wholesale and retail sales.

The survey showed that small marketers generally favored legislative solutions to industry issues and opposed free market solutions, while the larger marketers leaned toward allowing the market to regulate itself.

Asked to comment, one small marketer said: "We are seeing pricing practices that are predatory in nature . . . they are coming from our own ranks and not the majors."

According to a mid-size jobber: "Since the major refiners won't clean up their act voluntarily, the free market will not solve the problem."

One large marketer expressed it this way: "The fewer regulations, the better. We do not feel you can improve on a competitive free market."

DOE's Short-Term Energy Outlook: Basically Mediocre

The federal Department of Energy, in its latest update on what's ahead for oil products and prices, says things aren't going to be as good as it originally anticipated.

Last November, for example, DOE projected gasoline prices at an average of $1.20 gal. for the year 1985. Now, the agency believes gasoline prices will wind up around $1.18 gal. It also thought that distillate would average $1.10 gal. during the year. The new forecast is a disappointing $1.108.

There's a bit of good news in some aspects of the latest forecast, however. Demand for some products, notably distillate and resid, will be a bit stronger than the November forecast had projected.

But at the same time the gasoline picture isn't that bright. The forecast presently calls for an average of 6.67-million b/d, whereas in November it had been believed it would be reaching 6.75-million b/d. That's a significant reduction of 8,000 b/d.

Here's the new DOF forecast. [For prior data, see Jan. '85, page 38]:

	1983	1984					1985					1986	
Prices (Retail)	**Avg.**	**1st Qtr.**	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Avg.**	**1st Qtr.**	**2nd Qtr.**	**3rd Qtr.**	**4th Qtr.**	**Avg.**	**1st Qtr.**	**2nd Qtr.**
Motor Gasoline	$1.22	$1.20	$1.22	$1.19	$1.19	$1.20	$1.16	$1.16	$1.20	$1.18	$1.18	$1.18	$1.19
Distillate Fuel Oil	1.08	1.13	1.08	1.04	1.06	1.08	1.09	1.06	1.06	1.10	1.08	1.11	1.08
Wholesale	0.82	0.86	0.83	0.79	0.82	0.83	0.83	0.81	0.81	0.82	0.82	0.83	0.82
Retail	1.08	1.13	1.08	1.04	1.06	1.08	1.09	1.06	1.06	1.10	1.08	1.11	1.08
Residual	0.65	0.69	0.70	0.68	0.69	0.69	0.70	0.68	0.67	0.67	0.68	0.66	0.65
Supplies (million b/d)													
Motor Gasoline	6.62	6.34	6.88	6.86	6.75	6.71	6.42	6.96	6.88	6.75	6.75	6.36	6.86
Leaded	2.97	2.69	2.86	2.75	2.62	2.73	2.53	2.69	2.62	2.53	2.59	2.51	2.66
Unleaded	3.65	3.65	4.02	4.11	4.13	3.98	3.89	4.26	4.26	4.22	4.16	3.85	4.21
Distillate Fuel Oil	2.69	3.20	2.79	2.59	2.87	2.86	2.96	2.72	2.50	2.88	2.76	2.85	2.75
Residual Fuel Oil	1.42	1.74	1.30	1.22	1.21	1.37	1.61	1.18	1.15	1.31	1.31	1.62	1.15
Other Products	4.50	4.77	4.61	5.01	4.88	4.82	4.73	4.61	5.04	5.04	4.86	4.98	4.83
Total Supplied	15.23	16.06	15.58	15.67	15.71	15.75	15.72	15.46	15.58	15.99	15.69	15.80	15.59
Total Imports	5.05	5.41	5.51	5.20	5.44	5.39	5.01	5.40	5.41	5.28	5.28	4.90	5.43

Source: Energy Information Administration, February 1985.

Premium Octanes Continue Steady Upward Climb

The octane levels in premium unleaded gasoline showed a marked improvement last summer, in the quasi-official semi-annual study of motor fuels in all parts of the country.

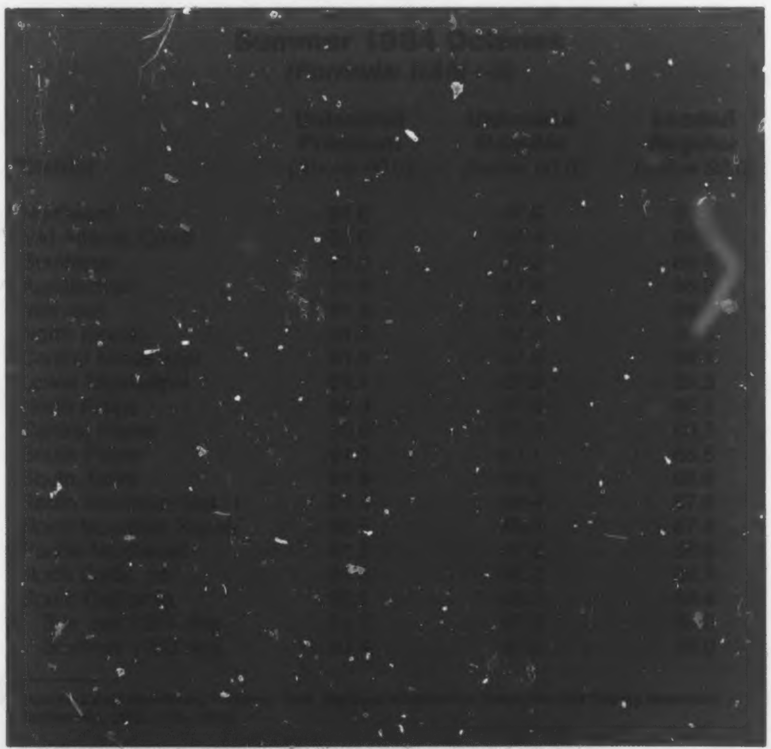
The octane level of premium unleaded rose to 91.7 octane, up three-tenths of one point over the summer of 1983 and equaling the previous all-time high set in the summer of 1982 [*NPN*—May '84, p27].

The study, released in mid-February, showed that the octane levels for unleaded regular and leaded regular were relatively static last summer.

The study is made by the National Institute for Petroleum and Energy Research, Bartlesville, Okla., which used to be the government's research center. The work is done under contract with American Petroleum Institute, with the research bureau handling all the data on a confidential basis.

Here are the findings:

	Summer '84	Winter '83-84	Summer '83	Winter '82-83	Summer '82
Unleaded Premium (Above 90.0 octane)	91.7	91.3	91.4	91.5	91.7
Unleaded Regular (Below 90.0 octane)	87.3	87.3	87.5	87.3	NA
Leaded Regular (Below 93.0 octane)	89.0	88.8	89.0	89.1	89.0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Sharp Stores Fortify N.M. Jobbership

What Refiners See from Lead Phasedown

Can Big Oil Halt Hostile Takeovers?

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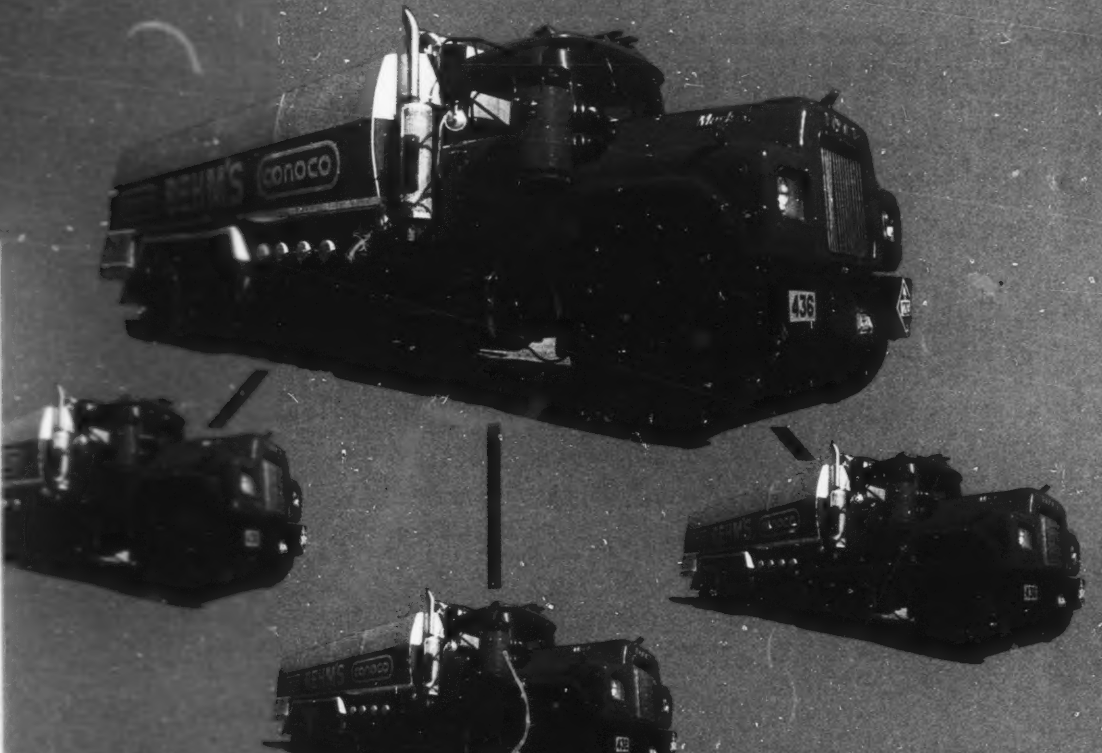

Small Jobbers Under Seige

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The era of the small jobber who's tied directly to a major company is drawing to a close. The 2-million-gal./year or so jobber is beginning to align with "super" jobbers. One North Dakota jobber with 50 sub-jobbers shows how such supply arrangements can work. **Page 42**

Cover design by Marcus Design Inc., Chicago; Photo by Tim Grace

When John Yarbrough became head of a 47-year-old New Mexico Shell jobbership last year, he knew he had to diversify his company. So, he converted to C-store outlets, opened a carwash and closed unprofitable dealer-ops. **Page 53**

FOR USE AS A
MOTOR FUEL ONLY
CONTAINS
LEAD
ANTIKNOCK COMPOUNDS

Some refiners predict both higher prices and spot outages when EPA halves lead content July 1. A 15-company survey tells what they expect. **Page 50**

• TRENDS

Pickens Raid on Unocal: Is This 'The Last Straw?'

Now that the battle has been joined, the outcome of the titanic struggle between Fred L. Hartley and T. Boone Pickens is going to have a lasting impact on the oil marketing industry.

It could put an end to the corporate raiding that Pickens has been fostering and Wall Street has been bankrolling.

Or it could trigger an emotional reaction that would tie a can to any more major acquisitions or mergers by oil companies for the time being.

Conceivably, it could open the Wall Street floodgates, so that no company out there—not even an Exxon—could consider itself safe. [See story on page 33.]

Hartley, chairman of Unocal Corp., is the most formidable foe that Pickens has yet faced in his oil industry incursions to date. Hartley is plain tough—much tougher than Gulf's Jim Lee and even Phillips' Bill Douce.

His company, though smallish, is well-managed, profitable and generally in better financial shape than many oil companies. He himself is entrenched almost to the point of one-man control [*NPN*—Oct. '84, p44].

If Pickens should come acropper in his bid to wrest control of Unocal from the doughty Hartley, it could be the beginning of the end for the corporate raiders he personifies. Such a loss would be a costly affair for Pickens and his associates. Wall Street doesn't back losers, so he'd have a difficult time getting off the ground again.

If he should win, and force Hartley either to ransom his company with "greenmail" or find a "white knight" to save the day, the outcome is bound to stir up a wave of controversy that would rattle the industry the rest of the year.

This time around, the situation is somewhat different for Pickens. There's a noticeable change in the atmosphere, partly from industry fears of what is happening to it and partly from the drubbing that Pickens and New York financier Carl Icahn gave poor Phillips Petroleum in beating it into the ground [*NPN*—Feb. '85, p29].

There's more sensitivity to the depredations of the raiders. And, people are talking up instead of merely shaking their heads, especially in marketing, where the Chevron/Gulf and Texaco/Getty spinoffs are still having painful repercussions and class action suits are still a distinct possibility.

The laissez-faire of recent years is evaporating and there is genuine concern about the way the industry is being reshaped not by itself and the normal forces of competition but by entrepreneurial adventurism and the opportunistic ambitions of outsiders.

Dave Robinson, president of Petroleum Marketers Assn. of America (PMAA), laid it on the line this way:

"It's time Congress carefully examined this takeover trend and developed necessary legislation to prevent corporate raiders from savaging healthy, well-run companies. Until that legislation can be developed, a moratorium on hostile takeovers should be [put] in effect.

"The dismantling of a company such as Unocal would not be in the long-term interests of Unocal shareholders and it would certainly not be in the best interests of the country, particularly in regard to energy security."

It wouldn't take much to get PMAA and the oil marketing fraternity into action on the Hill to promote such legislation. And they'd find a good reception from congressmen who have steadily opposed the Reagan administration's policies of relaxing restraints and controls, no matter what the consequences for individual companies.

If, by chance, Unocal would be forced to its corporate knees and a white knight solution was the only way out, this would not set well in an industry which has already lost much of its independent strength in recent years.

Conoco is now a division of Du Pont; Marathon is a subsidiary of U.S. Steel, and Citgo has been pretty well dismembered after being taken over by Occidental. Getty and Gulf are in the process of being dismantled now. Phillips has mortgaged its future so heavily that it may have to sell off much of its downstream apparatus.

It used to be that size alone was sufficient to make a corporation takeover-proof. But the mega-bucks deals of recent years have shot that concept full of holes. It used to be, too, that good solid management was a substantial asset in locking the doors against takeovers. That concept is being tested now in the Unocal battle.

If Unocal loses, then the door's open for Wall Street to do what it wills in the industry. It has the money and the wallop. It can line up credits of $10-billion to $15-billion without effort and, one banker says, it can line up $25-billion, if the right target comes along. No oil company is safe with that kind of money so readily available.

—J. Richard Shaner

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

FEBRUARY	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.128	$1.041	$1.131	$1.290
Regions:				
Northeast	1.160	1.070	1.147	1.289
North Central	1.112	1.045	1.130	1.282
South	1.115	1.022	1.113	1.286
West	1.133	1.042	1.141	1.306

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	3/29/85	3/30/84
Gasoline (total)	221,051	245,051
Gasoline (unleaded)*	102,281	101,080
Jet Kerosine	34,733	34,183
Distillates	100,320	111,445
Residual	44,607	48,452

**Included in gasoline total.*
Source: American Petroleum Institute.

early attendance figures showed an increase over last year's show.

The IPMA marketing committee passed a resolution opposing fees on imported crude and refined petroleum products, placing the Illinois group in opposition to some other state jobber associations. Although recognizing that imports may threaten domestic marketers, the resolution seeks to limit import fees to help reduce the potential for petroleum embargoes and cutoffs such as those that occurred in the 1970s.

Other resolutions called for IPMA opposition to local bans or ordinances limiting the sale of alcoholic beverages at locations that sell motor fuel, and support for unattended self-service motor fuel sales where properly controlled.

This latter resolution was in direct contrast to remarks made by Dwight Elliott, of the Illinois Fire Marshal's office during an address in an underground storage tank seminar. Elliott said his office has vigorously opposed unattended gasoline dispensing in the past and will continue to do so in the future. "We don't care how the pumps are controlled, but we do care that there is an attendant on duty at any time fuel is dispensed," Elliott said.

Elliott also said that the Illinois Fire Marshal's office would be designated by the governor sometime in April as the state agency to record all underground tank registration information as required under the amendments to the Resource Conservation and Recovery Act passed last year [*NPN*—Nov. '84, p16].

In addition to tank registration, new Illinois underground tank regulations will most likely require monitoring wells at the estimated 20,000 underground tank sites across the state, Elliott said.

Rudy White, the American Petroleum Institute's underground tank leak coordinator, told the seminar that API currently is working with a private contractor to thoroughly evaluate the API's recommended inventory control procedures. An updated version of these widely accepted practices is expected out in six months, he said.

Ashland plans to market pre-blended alcohol fuel

Ashland Oil Co. announced in March that it is planning to sell to wholesalers a pre-blended ethanol/gasoline mix from the rack at its St. Paul, Minn., refinery.

Once the program is underway, Ashland will sell pre-blended regular unleaded with ethanol and premium unleaded with ethanol in addition to the straight ethanol it currently makes available at the St. Paul refinery.

The company said blending at the refinery is preferable to splash blending in a tank truck because refinery-blended product is less likely to be contaminated by water or other impurities.

Minnesota, one of only a few Midwest states still encouraging ethanol blending, is set to increase its ethanol-blend tax exemption from 2¢ to 4¢ gal. July 1.

Ashland joins Amoco and Koch in recent expansions of their alcohol blending programs in Minnesota. [*NPN*—April '85, p30].

By Mark Emond

WEST COAST

Arco Ends Chinese Product Imports; More Left for Indies to Toughen up

West Coast gasoline markets might well feel the effects of Atlantic Richfield's reported decision not to buy Chinese gasoline this year.

It could be a sign that Arco's grip on Western gasoline markets is weakening, even if only a little.

It could be that Chinese gasoline prices will soften.

It could be that importation of Chinese gasoline by West Coast independents will increase.

It could be all of the above.

Why Arco stopped importing Chinese gasoline this year isn't reported, but one could speculate, going back to the reason the company first started importing product.

Jessica Korzenicki, manager of product planning and analysis, was quoted as saying Arco had needed the gasoline because its own West Coast refineries could not meet the demand of its service station network.

Why this was no longer true wasn't explained, but presumably Arco is now able to supply its own retail demand.

The trade has been buzzing the past two or three months with how Arco's competitors are getting tougher. In some markets Arco no longer has the big price edge it once did. And, Arco is running out of desirable private-brand stations to brand up.

The combined effort on Arco's market share isn't discernible yet, but some light will be shed on the question when taxable gallonage reports on the first quarter of '85 become available.

It's possible Arco has stopped importing Chinese gasoline for political reasons. There's no indication the cost advantage of Chinese gasoline has disappeared, since other companies appear to be importing as much of it as ever.

Gasoline imports, from China and elsewhere, are under attack by some refiners and marketers for allegedly forcing some U.S. oil companies out of business or to the wall, and for undermining U.S. oil independence [*NPN*—April '85, p29; Feb. '85, p36].

In any event, Arco was playing no small part in China's effort to get rid of gasoline, an unwanted byproduct in the country's necessary production of fuel oil for industry.

Arco's decision to pull out makes that much more gasoline available to others, including West Coast independents. It remains to be seen whether China will have to cut prices to move its surplus elsewhere.

Arco imported 3,743,267 bbl., or 157-million gal., of Chinese gasoline and blending stocks in 1984, according to Pacific West Oil Data, a statistical company based in Panorama City, Calif. This represented about 6% of Arco's entire PAD 5 gasoline sales during the year (California, Oregon, Washington, Arizona, Nevada, Alaska and Hawaii).

Perhaps more importantly, Arco's imports amounted to a huge 38% of the total 414-million gal. of Chinese gasoline imported on the West Coast in 1984. This is quite a lot of gasoline to throw back onto the market.

A question arises how Arco's China pullout affects the overall picture of West Coast gasoline imports, of which the Chinese is a part. Is it just a splash in what critics charge is a growing torrent?

An accompanying chart, based on Pac-West data, shows that West Coast gasoline imports have not increased the past three years, though they are highly variable from month to month. Imports averaged 42,000 b/d in 1984, slightly more than the 40,000 b/d in 1983 and 16% less than the 50,000 b/d in 1982.

Nor has imported gasoline taken over a larger share of the PAD 5 market. Imports amounted to 3.8% of total PAD 5 gasoline demand in 1984, compared with 3.8% in 1983 and 4.8% in 1982. In the first two months of 1985, it amounted to 3.1%.

Of course, some gasoline importation is routinely done internally within a company to move foreign-held products or execute exchanges. Therefore, perhaps the real question is how much of the West Coast gasoline imports come from relatively new Far East exporters, particularly China. This is where the competition is coming from.

There's no upward trend of Chinese gasoline imports either, the PacWest data shows. The proportion of Chinese to total West Coast gasoline imports is staggering, but the average annual amount has been roughly the same for three years.

On a monthly basis, the percentage of Chinese to total gasoline imports varies greatly, possibly in part because of the variability of tanker arrivals. The highest monthly percentage of Chinese gasoline in 1984 was 92% in August; the lowest, 31% in May. The highest in 1983 was 89% in September; the lowest, 39% in June. The highest in 1982 was 88% in April; the lowest, 34% in January.

But the annual monthly average was about the same for the three years: 65% in 1984, 67% in 1983, and 64% in 1982. [See bar graph.]

Most of the Chinese gasoline is shipped from Dairen, located across Korea Bay from Pyongyang, North Korea, although some comes from Shanghai and a couple of other ports. Other Far East gasoline comes from Indonesia, Singapore, Korea and even India.

The principal West Coast importers of Far East gasoline apparently are Wickland Oil Co., Sacramento; Landsea Oil Co., Irvine (which took over the former Urich Oil terminal in the San Francisco Bay area); and Pacific Refining Co., Long Beach, with a refinery at Hercules in the San Francisco Bay area.

In an analysis of tanker arrivals in the ports of San Francisco and Long Beach/Los Angeles over a six-month period in 1984, Wickland led with eight cargoes of approximately 1,240,000 bbl.; Landsea was second with seven cargoes of 1,070,000 bbl.; and Pacific third with six cargoes of 970,000 bbl.

Some other importers of Far East gasoline are Tosco Corp., Santa Monica; Golden Gate Petroleum Co., Emeryville; Golden West Refining Co., Santa Fe Springs (the former Gulf Oil refinery); and U.S. Oil and Refining Co., Tacoma, Wash.

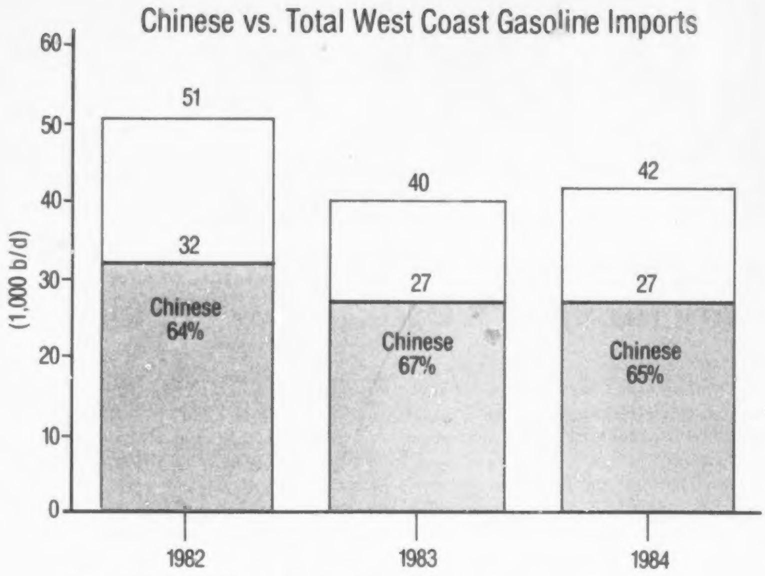
The list of West Coast importers is limited because of the necessity of deepwater storage. Substantial newcomers to this list are not likely.

In the coming months, some of these independents could become more active. Whatever else is the outcome of Arco's pullout, it appears that independents will be marketing more Chinese gasoline.

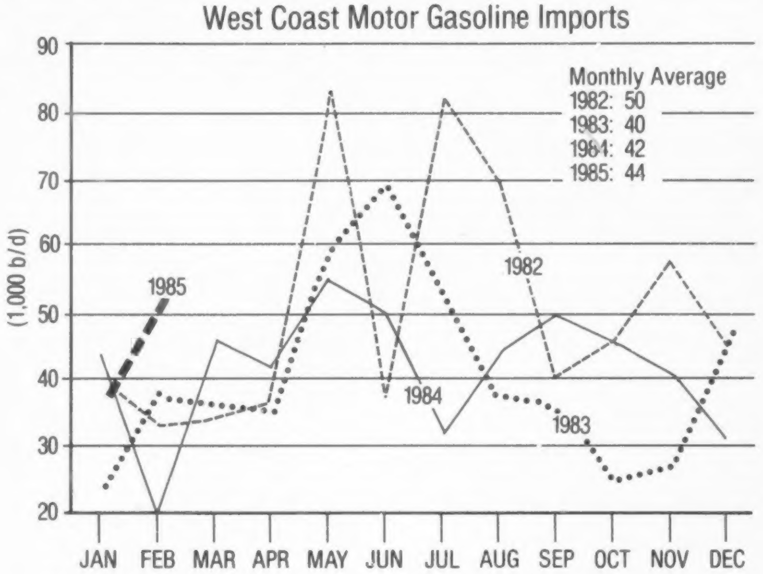
There has been trade talk to the effect that the current U.S. lead phasedown effectively dooms importation of Chinese gasoline, which is low-octane leaded product. This may be wishful thinking.

Informed sources believe the product can be upgraded by segregating gasolines that are now commingled, by blending easily available reformate to obtain unleaded octanes, and by changing internally refined product prices to bury true costs of gasoline. All that is believed needed for China to maintain exports is the will, which it has.

Until events prove otherwise, therefore, the prudent conclusion would be that Chinese gasoline imports will continue as before.



Source: Pacific West Oil Data. Includes blending stocks.



Source: Pacific West Oil Data. Includes blending components.

West Coast Gasoline Imports
(000 bbl.)

	1982	1983	1984	1985
Jan	40	22	44	35
Feb	33	38	20	52
Mar	34	36	46	
Apr	37	35	42	
May	83	59	55	
Jun	37	69	50	
Jul	81	51	32	
Aug	70	38	44	
Sep	40	36	50	
Oct	46	25	46	
Nov	58	27	41	
Dec	44	45	31	

Source: Pacific West Oil Data. Includes blending components.

How 1984 Mergers Altered Retail Rankings

After 1984's flurry of oil mergers, significant changes in rankings and station numbers occurred for three of the top 21 companies.

For the other 18, 1984 was marked only by the now-usual number of pullouts, consolidations, and station closings. For the three companies that merged or bought, however, the changes that occurred were of major proportions.

Texaco jumped to the top of the heap in '84 with a net gain of 868 outlets, including those from the Getty Oil purchase and new Texaco 2000 units, and added three states to its marketing string. In the fall, however, the company will pull out of branded marketing in Indiana, Kentucky, Wisconsin, and most of Illinois [*NPN*—April '85, p14].

Chevron was busy in late 1984 solidifying its merger with Gulf, and actually ended the year with a few less states and outlets than it had in '83. But now that it officially has added the 7,922 Gulf properties it retained, it will come out a winner, moving from No. 6 to No. 2 with 18,540 stations in 42 states. It remains to be seen if Chevron will leapfrog to No. 1 when Texaco sheds those Midwest outlets.

The biggest winner of all was Sohio. The Southeast properties it picked up in the FTC-mandated Chevron/Gulf merger scramble helped it add the major part of 6,460 units for a total of 8,560 branded retail outlets. When the year ended, Sohio was sitting at No. 9, up from No. 15 on the list.

As a sidelight, unranked Power Test became the nation's largest independent gasoline marketer in early January when it took control of the Northeast Getty assets from Texaco. At the end of 1983, the company reported 475 outlets in five states. The company now reports approximately 2,300 gasoline stations in a 12-state area—a total that would place it at No. 15 in the major oil company retail outlet rankings. **NPN**

		Outlets	*'83*
1	**Texaco**	19,558	(2)
2	**Exxon**	18,139	(1)
3	**Amoco**	15,652	(3)
4	**Mobil**	13,862	(4)
5	**Shell**	11,010	(5)
6	**Chevron**	10,618	(6)
7	**Union**	10,365	(8)
8	**Phillips**	9,705	(7)
9	**Sohio**	8,560	(15)
10	**Sunoco**	6,425	(9)
11	**Conoco**	4,800	(10)
12	**Fina**	4,385	(12)
13	**Arco**	3,884	(11)
14	**Citgo**	3,599	(13)
15	**Marathon**	2,299	(14)
16	**Diamond Shamrock**	2,060	(17)
17	**Ashland**	1,910	(16)
18	**Kerr-McGee**	1,839	(18)
19	**Murphy**	591	(19)
20	**Tenneco**	423	(20)
21	**Crown Central**	188	(21)

	Number of states*		Branded retail outlets	
	'84	'83	'84	'83
Amoco	36	35	15,652	17,800
Arco	22	24	3,884	4,363
Chevron	38(a)	39	10,618(a)	12,111
Exxon	38	41	18,139	18,707
Mobil	41	43	13,862	15,403
Shell	38	40	11,010	12,147
Texaco	46	43	19,558	18,690
Ashland	15	15	1,910	2,071(b)
Citgo	31	31	3,599	3,915
Conoco	34	40	4,800(d)	5,091
Crown Central	7(c)	8	188(c)	200(d)
Diamond Shamrock	24	25	2,060	1,993
Fina	22	20	4,385	4,037
Kerr-McGee	22	21	1,839	1,785
Marathon	6	5	2,299	2,210
Murphy	14	14	591	614
Phillips	34	37	9,705	11,827
Sohio	30	20	8,560	2,100
Sunoco	29	27	6,425	6,808
Tenneco	15	15	423	418
Union	42	44	10,365	11,221

Source: *NPN* questionnaires

* Includes District of Columbia.

(a) Excludes Gulf stations acquired in early 1985. The 7,922 Gulf stations give Chevron 18,540 outlets in 42 states.

(b) Old 1983 count of 187 outlets was for Ashland-branded company-ops only—new counts include all of Ashland's branded outlets, plus Superamerica and other direct-operated brands.

(c) After May 1 station swap with Mobil, total is 185 stations in six states.

(d) Approximately.

Marketers vs. Refiners On Blendstock Tariffs

Congress is expected to decide this summer whether to change existing tariff classifications for catalytic naphtha and other gasoline blendstocks.

The Reagan administration last year proposed allowing all imported blendstock to enter the U.S. at a 1.25¢ gal. tariff—the same rate as finished gasoline. Under existing law, most napthas are taxed at a higher rate. The Reagan plan was dropped by Congress after a number of refiners complained that the proposal would result in a hefty increase in low priced imports.

The Senate Finance Committee and the House Ways and Means Committee then asked the International Trade Commission to study the issue and make a recommendation to Congress. At an ITC hearing in March, the refining industry and marketing groups were at odds over whether Reagan plan should be adopted.

Refiners, claiming that imports will rise if all blendstocks are taxed at 1.25¢ gal., urged the ITC to nix the plan. The Society of Independent Gasoline Marketers of America and the Independent Gasoline Marketers Council, two groups which are actively opposing any government action which restricts imports, sided with the Reagan administration proposal.

The ITC was expected to make its recommendation by April 15. **NPN**

API Tank Seminars Available Free to All

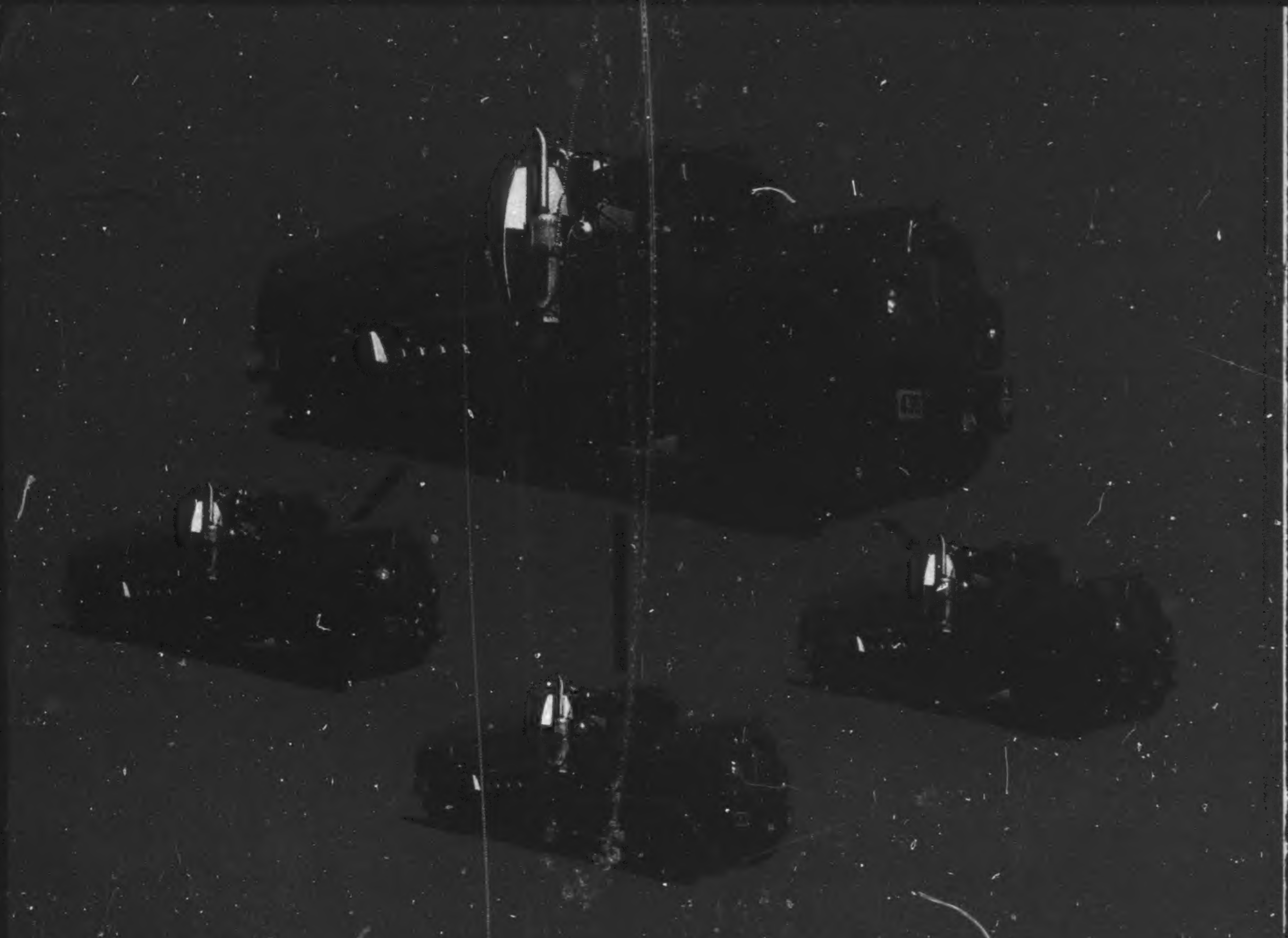
American Petroleum Institute says it's ready, willing and able to put on an underground storage tank seminar anywhere in the U.S. for all interested parties.

The seminars, provided at no cost to the participants, would deal with the prevention, detection, investigation, recovery and cleanup of leaks from underground tanks. They could be as short as one hour or as long as all day, depending upon the sponsoring organization's needs.

In its announcement, API pointed out that many underground storage tanks are owned by farmers, government agencies, trucking companies, taxi firms, school systems and other users of petroleum products.

The seminars are part of API's continuing program on underground tank educational activities.

API also said it has available a 40-minute slide show which uses a large plexiglass laboratory model to dramatize the movements of underground water, how oil-based liquids can migrate to them and techniques for recovering the petroleum liquids. **NPN**



Small Jobbers Under Seige

Will Many of Them Become Sub-Jobbers?

The era of the small-volume independent oil jobber—one who is supplied direct by a major oil company—appears to be drawing to a close.

Some fast-developing trends indicate that most branded jobbers pumping below 2-million gal. a year, and perhaps as high as 5-million gal., will have to align themselves with "master" or "super" jobbers in the future to remain in business.

A move in this direction is already developing. Some large jobbers now have quite a few small ones under their wings as "associate" or "sub" jobbers. [See following story for how one such arrangement works.]

By Marvin Reid
and Tim Grace

The major oil companies, in general, have been making substantial reductions in their jobber networks since federal price and supply controls were lifted in early 1981. Much of this fallout has occurred among small jobbers.

In early 1981, with the onset of decontrol, 19 major companies reported to *NPN Factbook* that they had 17,372 jobbers they supplied with their branded products. Last year, this number had dropped to 13,687 or nearly 27%.

The companies say there are many more small jobbers who may have trouble making it, due to changing industry conditions and the highly-competitive nature of today's marketplace.

The Petroleum Marketers Assn. of America estimated there was a "universe" of 15,160 jobber companies in operation at the end of 1982. Of this total, PMAA estimated 65.1% had annual volumes of under 5-million gal. It estimated that 44.3% were below 2.5-million gal.

These numbers of small jobbers are believed to be shrinking rapidly as most majors seek to do business through fewer but larger jobbers.

Cutoff Pressure Builds

Increasingly in recent months, some majors have been advising their small-jobber accounts that they either have to find a way to grow or plan on looking elsewhere for supply. This is especially true for those jobbers pumping less than 2-million gal./year.

This is causing some bitter reaction among jobbers, even large ones.

"Some of these little guys are very good marketers," says Tom Potter Sr., a senior vice president of the Petroleum Marketers Assn. of America and a large North Carolina jobber. "There's no way you could run some of them out just on economics."

Phillip R. Chisholm, PMAA's executive vice president, says he objects to "some companies playing like God, setting a gallonage number and saying all that fall below it must go. That's not free enterprise."

Other jobbers, though, tend to agree that the day of the small-gallonage jobber supplied direct by a major oil company is about over.

'We will wind up within a few years with one-third to 40% fewer jobbers, doing the same amount of business all jobbers are doing at present.'

—Major oil exec

"It's terribly unfortunate, but there is no place in today's market for the very small jobber who is totally on his own," says Jack Griffith, last year's PMAA president.

Regardless of jobber reaction, some oil company executives say they must prune their books of small-jobber business for two reasons.

First, they say, conditions which once fostered the creation and growth of thousands of small jobbers and commission agents have changed. To reduce their own overhead costs, most majors say they must distribute their products through fewer but larger jobbers.

Second, they say it's tough for the small-volume marketer to generate the cash flow required to keep pace with today's competitive conditions. Sooner or later, they see those who can't increase their volume falling behind their competition. "We've got to wonder what happens to us when they go belly-up, owing us a lot of money," says one executive.

Most companies are doing a lot of counseling and working with their small jobber accounts on possible solutions, rather than simply canceling their supply contracts. There have been some contract cancellations since decontrol, however, and there are indications there will be more cutoffs for those who can't increase their size. Few majors will take on small jobbers as new accounts now, and some do not renew contracts as they expire.

What Minimum Size?

Oil company executives offer different opinions as to what size a jobber needs to be to make it in today's marketplace environment. In addition, most point out there are always exceptions. Some small jobbers are financially solid and profitable.

Generally speaking, though, some company executives say they doubt there is much future for the jobber pumping less than 1-million or 2-million gal. annually, if he has little or no prospect for growth on his own. Others talk in terms of 5-million gal. or higher.

"We are urging those doing 5-million gal. or less to get affiliated with a large jobber right away," says one company executive. "We think this is the minimum volume required (to go it alone) now and we believe this minimum will rise to 7-million or 8-million gal. very soon. I think we (the industry) will wind up within a few years with one-third to 40% fewer jobbers than we have today, but these will be doing the same amount of business that all jobbers are doing at present."

Bob Anderson, an Exxon jobber who heads up a small jobber task force for the Texas Oil Marketers Assn., says some of his supplier's people "have said for several years that if a jobber is not running 1-million gal. per month, they don't see how he can survive. Everyone in Exxon doesn't share that philosophy." Anderson was on Exxon's marketing staff before taking early retirement to take over a small agency. His Twin Lakes Petroleum Co. of Athens, Texas, averages around 700,000 gal. per month.

Charles Bowerman, Phillips Petroleum marketing vice president, talks in terms of 1-million to 2-million gal. as minimum requirements. Phillips and Amoco are believed to have the largest numbers of small-volume jobbers.

Other company executives say that any jobber who wishes to remain independent and profitable must have a high enough volume or be able to generate sufficient cash flow from diversified operations to afford the tools and investments required to keep pace with his competition.

"He has to be able to afford such things as a computer, make investments in modern facilities, and at the same time generate enough cash flow so he will make $100,000 to $150,000 a year," says one executive. His company wants "this kind of guy, one who is willing to roll the dice," for the future.

'I don't want anything to do with being a sub-jobber. The big guy gets his cut, and where would that leave me? If I can't make it on my own, I'll get out.'

—Bob Anderson, Texas oil jobber

Must Think Big

It's not easy for many small jobbers to think in terms of large cash flows and investments.

The majority trace their roots back to a time when the oil companies were inclined to establish local bulk plant and wholesale distribution operations in virtually every small town in America. Many of today's small jobber companies were started originally as commission agencies. Typically, in the beginning, the oil company owned the agent's bulk plant, inventories and most of his equipment, including tanks and pumps loaned to farm and other rural customers. The companies often "carried" all of the agent's accounts receivable. The agent usually owned his rolling stock and, as a rule, he and his family handled all the bookkeeping and delivery work.

Many such "mom & pop" operations haven't changed all that much except most former agents are jobbers today. They own all of the things once owned by their suppliers. They also must take care of their credit business in many cases.

Whether as a commission agent or small rural jobber, such distributors traditionally did little more than eke out a decent living.

In 1975, for example, when Amoco began converting some 3,000 commission agents it then had to jobbers, its average agent supplied 800,000 gal. of oil products annually to retail, farm, heating oil and small commercial accounts. He grossed from $20,000 to $25,000 annually and could net about $14,000.

By "going jobber" there was the lure of possibly doubling his gross income because, at the time, jobber margins were running about double agent commission rates. This was offset, though, by investments the converted distributor had to make in inventory, equipment and accounts receivable.

It became crucial for such distributors to increase their gallonages to help meet the higher costs of doing business as a jobber.

In 1975, it took about $50,000, on average, for one of the Amoco agents to buy his business from the company and become a jobber. Today, if he is still around, he is looking at a $300,000 or so investment for a single combination convenience food store/self-serve gasoline facility. The experts are saying he must diversify into this or something similar to keep pace with his competition. If he doesn't, they say, he won't survive.

Big Fallout Already

Although Amoco's marketing management in 1975 expressed high hopes that its approximately 3,000 commission agents that year would become successful jobbers, many obviously didn't make it.

Amoco reported to *NPN Factbook* in 1975 that it had a total of 3,483 jobbers and commission agents. By Jan. 1, 1984, this total had shrunk to 1,923 jobbers and no agents.

But Amoco is not the only major oil company, by any means, now reporting sharply lower jobber and agent numbers than 10 years ago. Almost all agents, in fact, have become jobbers or disappeared.

'Catch-22' Situation

Some oil companies are devoting considerable time and money in their efforts to help their small jobber accounts either grow in size or merge with other jobbers. At the same time, though, their sales representatives tend to spend more of their day-to-day time cultivating and helping their larger jobber customers.

In some ways, the small jobber seems to be caught in a "Catch-22" situation. He's given all kinds of counseling about a need to get bigger, but may find that he sees his sales rep less often.

Conoco, for one, has put many of its small jobbers into a category it calls "phone accounts." This means that instead of regularly visiting such accounts, a sales rep calls them weekly. C.P. McCahill, general manager of division operations, and Eldon Saul, jobber coordinator, says this system has worked out well.

Small jobbers are in a 'Catch-22' bind: His sales rep gives him counsel about a need to get bigger, but he sees that rep less often nowadays.

"It provided us a way to better serve the small guy without running our costs up," says McCahill, who adds that the company's cost of keeping a man in the field now runs about $75,000 a year, up one-third over five years ago. Such a man's time may be better spent, he says, trying to help a 3-million-gal. jobber increase his business than on a 300,000 gal. a year one.

Some company people estimate it costs $200-plus per day now to keep a field rep on the road.

"Our people spend more time with the bigger guys," says another company executive. "The sales rep looks at a 20-million-gal. account and sees that if he can help him achieve a 10% increase, he's better off than fooling with a bunch of small ones."

The companies, in general, argue that it costs as much or more in manpower and time to "handle" a small jobber account than a large one. In some instances, the costs run higher because the small jobber often needs more help.

Company Programs

While the small jobber may tend to feel that he doesn't get the attention or respect from his supplier company that he received in the past, most company people say they have much concern and sympathy for the plight of the small jobber today.

Many such small accounts, says one company executive, go back several generations. They are "family," he says, but the cold, hard economics of today's marketplace conditions are forcing the companies to help such jobbers get bigger or die.

Most large supplier companies have some type of program now that is aimed toward helping the small jobber find a way to survive or make a relatively painless exit.

Union Oil's Eastern Region in 1981 identified some 105 small jobbers who "wouldn't make it," says a source, and gave them a year's notice that their supply contracts wouldn't be renewed. About 75 of these jobberships joined larger Union jobberships.

Last summer, Union developed a computer model for various size jobbers. Its marketing staff now uses this model to counsel its jobbers. It is designed to help a jobber identify his weaknesses and to help him map out plans for the future. In some instances, says a company source, the answers may indicate that he "needs to sell out or do something about merging with others."

Union doesn't see the "mom & pop" type jobber of the past surviving the future. "We feel that a jobber has to have enough volume to give him a good economic base to plan and do the things today's market requires," says a company source. "He needs to control at least 50% and preferably 75% of his volume, and he needs to diversify into such things as fast lubes and C-stores."

Conoco came out with a program about two years ago called "Impact," designed to help its jobbers evaluate their operations and map out plans for their futures. The program was developed, says McCahill and Saul, because marketplace conditions were "killing off" some of its jobbers.

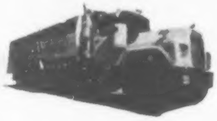
The Conoco program was put together by a team of its experienced marketing staff, including those from such areas as supply and pricing.

Basically, this program encourages the jobber to sit down and analyze how his company operations stack up in the marketplace environment of today and that expected in the future. He is encouraged to map out a five-year plan.

"It's not sophisticated and it is not a save-all tool," says McCahill, "but it gives us a chance to sit down and work with them."

The jobber, once he does this self-analysis, may see that he should merge with another small jobber or become associated with a large one. In some instances, the jobber may decide he wants to sell out. Whatever his decision, Conoco offers to help get him in touch with experts in mergers, banking, and so forth.

Phillips Petroleum has no formal or specific program, says Bowerman, but for



Union has developed a computer model for various size jobbers . . . to help identify their weaknesses and map out plans for the future.

the last 18 months it has been "putting out the word" to small jobbers in the up to 2-million gal./year range to consider "affiliating or consolidating."

Amoco, according to field reports, has been trying to come up with strategies to help keep afloat its hundreds of small jobbers in the Midwest, while at the same time reducing the company's operating costs involved.

In late March, rumors were widespread that Amoco was in the process of "setting up" large jobbers as "regional suppliers" of small jobbers. The small jobbers, according to reports, in effect would become sub-jobbers of the larger ones.

While some Amoco marketing people indicated that some such strategy for its Midwest jobbers was in the works in late March, detailed confirmation was lacking.

In North Dakota, however, senior marketing representative Dick Dupre, of Behm's Propane Inc., says Amoco told him some months ago that it would "give him" a number of small Amoco jobber accounts which failed to meet the company's "profitability index." [See following story.] This index, says Dupre, came out to the equivalent of 1-million gal./year volume. Dupre says he was told that he could pick up the accounts as their supply contracts expired.

Jobber Reaction

Some company sources say that while they have been counseling with and urging small jobbers to analyze their situations and possibly adopt new strategies, it isn't easy to get many to do so.

"There are some out there who own maybe three pumps, three tanks and are pumping 5,000 gal. a month. They supply a little farm business and they are just hanging on, sitting on their annuities," says one comapny executive. "Grandfather started the business, this is how he operated it, and they just don't feel right making any big changes. It's difficult to overcome this."

The majority of company people tend to believe the best solution for many small jobbers is to become an associate or sub-jobber of larger ones. Many small jobbers, however, don't think so.

Distributor Count since Decontrol

	1/1984		1/1981		Jobber/Agent change
	Jobbers	Agents	Jobbers	Agents	
Majors					
Amoco	1,923	0	2,256	3	−336
Arco	152	0	1,144	2	−994
Chevron	840	40	608	368	−96
Exxon	916	0	1,235	147	−466
Gulf*	1,087	0	1,406	143	−462
Mobil	1,803	28	2,108	61	−338
Shell	596	0	715	0	−119
Texaco	1,176	6	1,535	82	−435
Semi-majors					
Amer. Petrofina	440	0	427	0	+13
Ashland	32	160	34	170	−12
Citgo*	250	0	242	0	+8
Conoco	760	0	834	0	−74
Dia. Shamrock	166	0	127	2	+37
Getty*	582	0	644	7	−69
Kerr-McGee	428	0	314	0	+114
Marathon	86	0	87	0	−1
Phillips	1,751	2	1,591	6	+156
Tenneco	0	0	204	26	−230
Union	405	158	637	208	−282
	13,393	394	16,148	1,225	−3,586

*Since merged into other companies.
Source: *NPN Factbook*

"I don't want anything to do with being a sub-jobber," says Bob Anderson, who heads up TOMA's small jobber task force. "The big guy is going to get his cut and where would that leave me? If I can't make it on my own, I'll get out."

Anderson says he agrees, though, that many small jobbers pumping less than about 2-million gal. annually are "dying on the vine" and must consider such alternatives as the sub-jobber route.

Some state jobber association executives say the small jobber's future is critical for their groups.

Gerald Tedrow, executive director of the Intermountain Oil Marketers Assn., reports small distributors in the 1-million- to 3-million gal. range in Arizona, Idaho, Montana, Nevada, Utah and eastern Washington make up about half of his membership. Many of these are having a hard time collecting on accounts receivable. Jim Divine, director of the California Independent Oil Marketers Assn., says one-third of his membership falls in the small-jobber category. He reports some movement toward sub-jobber arrangements.

Illinois is having problems keeping its small jobbers alive, due to their economic conditions as well as supplier pullouts, reports Bill Deutsch, executive director of the Illinois Petroleum Marketers Assn. "Lots of rural jobbers have been hung out to dry because the banks take all the farmers money," he says. About 100 IPMA members do less than 1-million gal. a year, but Deutsch points out that many of them operate with low overhead costs.

The average-size jobber in the Northwest Petroleum Assn. is 1-million gal. a year, says outgoing executive director Gerald Everett [*NPN*—April '85, p65]. "We're seeing fewer and fewer large suppliers willing to take on smaller jobbers," he adds, and sees many of his small members going sub-jobber or selling out.

In Wisconsin, full-time small jobbers have to contend with part-time small ones, says Tom Moore, assistant vice president of Oil Jobbers of Wisconsin. He sees "a continual shrinking in the number of jobbers." One jobber's son who took over the family business "saw the writing on the wall" and sold the distributorship, retaining the real estate. "With the tough competition around now, many feel it's easier to just sell out."

Other association directors agree—the trend toward mergers or sellouts continuing.

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June 1985

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Chevron Tops in Market Share, *NPN* Finds

The Pros and Cons of Carwashes

Arco Move Heats up Restructuring Trend

NPN

National Petroleum News

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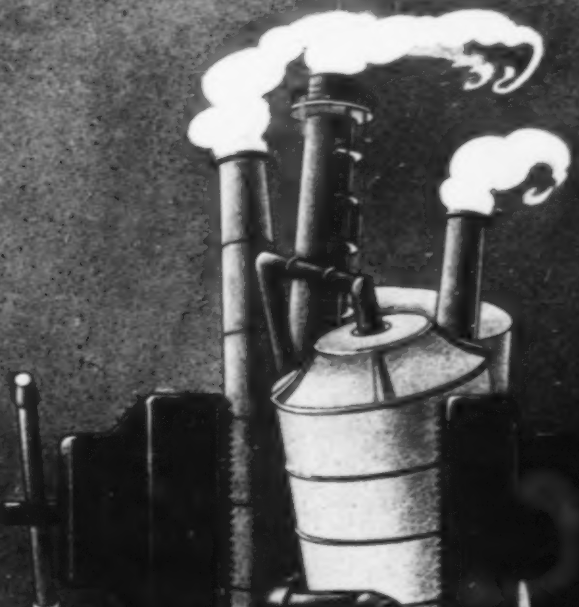

Will It Be a Watershed Summer?

Squeeze on Supply Options

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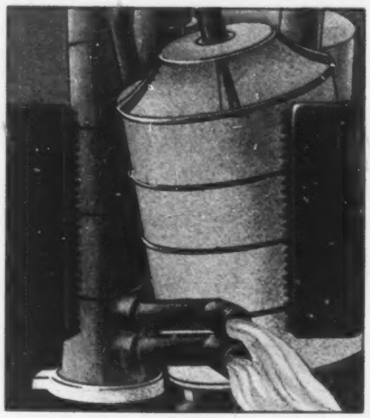


The U.S. refinery squeeze—especially among independents—and general overcapacity this summer are running headlong into product imports and unpredictable pricing. **Page 38**

Cover art by Anne Feiza, Chicago

TRENDS: Arco's sudden marketing withdrawal from the eastern U.S. signals other majors that perhaps they too should restructure and concentrate on key markets . . . or corporate raiders might do it for them. Page 16

Coffee
Club

George Thelen's Food-N-Fuel, St. Paul, Minn., sprung up seven years ago for the same reasons most oil jobbers get into C-stores . . . motor fuel is a natural tie-in. **Page 51**

Carwashes are being rediscovered by majors and some jobbers as a means of competing on gasoline and making money on their own. But one jobber expert says to be careful. **Page 44**

NPN

NATIONAL PETROLEUM NEWS JUNE 1985

Chevron, Texaco '84 Market Share Champs

Bolstered by the gallonage of their megabuck acquisitions last year, Chevron and Texaco skyrocketed from the ranks to become the nation's top gasoline marketers in 1984.

Chevron purchased Gulf Oil for $13.2-billion and Texaco bought Getty Oil for $10.1-billion in two of the upheavals that rattled the industry from top to bottom.

They shouldered aside Exxon, Amoco and Shell—the traditional leaders of recent years—by head-swimming margins. Chevron had a 69.7% increase in volume, and Texaco, 34.2%.

For Chevron, it was a spellbinding affair. It shot up from seventh in 1983 to first in 1984 with a gross gasoline gallonage of 9.6-billion gal. Without the Gulf gallonage, it probably would have been way down in the pack again in 1984. For the record, however, the 9.6-billion gal. it vended in 1984 represents an all-time high for any gasoline marketer in the U.S.

Texaco, which used to be the perennial leader but has been variously No. 4 or No. 5 in recent years, finished up about 1-billion gal. behind Chevron—at 8.7-billion gal. Getty's string of stations added about 2-billion gal. to Texaco's total, or else it too would have been somewhere around its usual position on down the line.

For both of the companies, however, the 1984 glories apparently will be one-shot affairs. Chevron already has spun off Gulf's southeastern properties in keeping with its agreement with Federal Trade Commission. So, this gallonage and probably some other Gulf gasoline volumes will not be available for the California company's 1985 totals. The same holds true for Texaco which, under FTC mandate, spun off Getty's marketing facilities on the East Coast and the Midwest-Midcontinent areas. The Texaco gallonage in 1985 then, should be much lower than 1984.

A surprising aspect of this share-of-market analysis developed by *National Petroleum News* is that it puts Exxon in a different perspective and ranks the company where most people always thought it should be—consistently on top, or very close to it. Exxon was third in 1984 but only because the Chevron/Gulf and Texaco/Getty combinations were too much to overcome. It was No. 1, however, in 1983, 1982, 1981 and 1980. The probability is that it will regain its leadership at the end of this year.

The thing that bothered many people was how Exxon could be the industry's statistical goliath in so many directions and dimensions yet be ranked so poorly in gasoline sales. It would appear then that not all of Exxon's gasoline sales were being recognized and measured so that its totals dropped behind several others, notably Amoco and Shell.

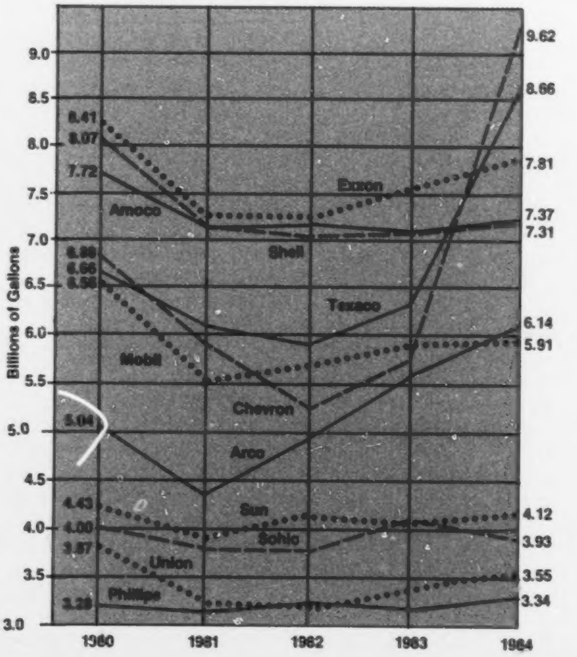
Amoco and Shell, because of the Chevron and Texaco skyrocketing, wound up fourth and fifth in 1984 gasoline volumes. A five-year overview shows, however, that Amoco consistently has been right behind Exxon in recent years and Shell, a close third.

NPN's data are collected from the annual reports of the top oil companies. They are gross gallons—for both on- and off-highway use. But since off-highway consumption of gasoline averages only 3.2% to 3.3% of the gross total, it really isn't enough to have a major impact on the volumes and the standings.

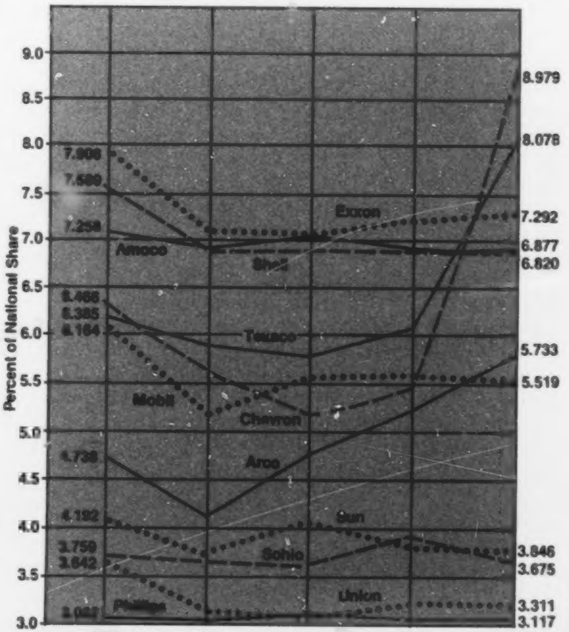
(continued on next page)

THE BIG PICTURE

In Billions of Gallons . . .



. . . and by Market Shares



The Gasoline Market: By Gross Gallonage and Relative Shares for the Top 12 Companies

	1984 (Total Sales Equal 107,219,431,000 gal.)				1983 (Total Sales Equal 104,231,431,000 gal.)			
Company	Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '84 vs. '83	Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '83 vs. '82
Chevron (a)	1	8.979%	9,627,240	69.7%	7	5.442%	5,672,100	4.5%
Texaco (b)	2	8.078	8,661,450	34.2	4	6.191	6,453,930	8.5
Exxon	3	7.292	7,818,300	2.4	1	7.427	7,741,650	4.8
Amoco	4	6.877	7,373,730	2.3	2	6.897	7,189,770	(1.7)
Shell	5	6.820	7,312,420	2.6	3	6.839	7,128,450	1.3
Arco	6	5.733	6,147,330	8.7	8	5.427	5,656,770	13.9
Mobil	7	5.519	5,917,380	—	5	5.677	5,917,300	2.1
Sun	8	3.846	4,123,770	2.3	10	3.868	4,031,790	(4.4)
Sohio	9	3.675	3,939,810	(3.7)	9	3.926	4,093,110	9.4
Union	10	3.311	3,550,428	2.1	12	3.336	3,476,844	6.9
Phillips	11	3.117	3,341,940	2.8	11	3.118	3,249,960	(1.9)
Gulf (c)	—	—	—	—	6	5.574	5,810,070	(4.8)
Total	—	**63.25%**	**67,813,798**	**(N.C.)**	—	**63.73%**	**66,424,840**	**3.1%**

(a) Chevron acquired Gulf in early 1984, thus Chevron's gallonage for 1984 includes 10 months of Gulf gallonage.

(b) Texaco acquired Getty in early 1984, thus Texaco's gallonage for 1984 includes Getty's gallonage for 1984; Getty had volumes of 1.9-billion gal. in 1983; 1.9-billion in 1982; 1.9-billion in 1981 and 2.0-billion in 1980. Getty's gallonage in 1980-83 averaged 1.8% of the national market share.

(c) Gulf was acquired by Chevron in early 1984, and its 1984 gallonage is included in Chevron's.

(N.C.) Data not comparable inasmuch as Texaco's 1984 gallonage included that of Getty, which is not reflected in prior years of 1980-1983.

Sources: Oil company annual reports and statistical supplements, plus special direct reports to *NPN*. Gross gallonage totals for each year are those of Federal Highway Administration except 1984 which is FHA data for 47 states and an *NPN* estimate for the other three. FHA data is for all uses—on and off highway. Since the off-highway consumption has averaged only 3.25% over the past six years, it is not considered significant in the market share ratios.

Gasoline Consumption: On- Vs. Off-Highway use

(billions of gal.)

Year	Highway Use	Off-Highway Use	Total Use	% Chng. Annually	% Off-Highway Use
1984 (a)	103.8	3.4	107.2	4.5%	3.2%
1983	99.4	3.2	102.6	.8	3.1
1982	98.5	3.3	101.8	(1.3)	3.2
1981	99.6	3.5	103.1	(1.6)	3.4
1980	101.2	3.6	104.8	(6.3)	3.4
1979	108.1	3.7	111.8	(3.5)	3.3
1978 (b)	112.2	3.6	115.8	—	3.1

(a) Estimated by *NPN* on basis of Federal Highway Administration data.

(b) Peak year of consumption.

Source: Federal Highway Administration, "Highway Statistics Annual." The totals in this table may vary slightly from other basic FHA tables because of some exclusions and additions.

The gross volumes are what the companies told their shareholders and the federal authorities in Washington were the amounts of gasoline they sold in 1984. They are bottom-line figures which accurately assess a given company's position and rank in the marketplace in gasoline sales.

To obtain the total gasoline sales for the entire industry, *NPN* used the Federal Highway Administration's data, which are based on the tax-paid gasoline sales reports prepared by all of the states and relayed to Washington. This too is an on-highway and off-highway accumulation. So, the figures are justifiably comparable to allow share-of-market percentages to be worked out.

The total sales figures used for the 1980-1983 period are the revised and final figures issued by FHA. The 1984 marketplace total is an estimate by *NPN* based on preliminary FHA reports from 47 states and projections for the three that were missing. Industry sources considered it an "agreeable ball-park figure which can't be too far off the mark."

Besides the positioning of Exxon as the leading gasoline marketer, the *NPN* share-of-market report also includes some other unusual aspects. One is the inclusion for the first time of Standard Oil Co. of Ohio in the top 12 oil companies. Sohio used to be discounted and ignored by some analysts because it had been confined to the state of Ohio. Later, via satellites BP and Boron, it penetrated other markets. The gasoline sales figures, retrospectively, show that it has ranked no worse than 10th over the past five years.

Another interesting sidelight was the fact that the top 12 oil companies marketed close to two out of every three gallons of gasoline sold in recent years. In 1980, the top 12 did have 67% of the national market, but this figure has eroded slowly so that in 1984 it was down to 63.25%. *—J. Richard Shaner*

State Tax Hike Fever Could Ease with Release Of Uncle Sam's Billions

Some $7.2-billion has been released by Congress for Interstate highway repairs and new construction following recent enactment of the long-delayed Interstate Cost Estimate (ICE) legislation. Passage of the bill could stem the growing support in some states for higher gasoline taxes to fund highway refurbishing.

The federal Highway Trust Fund monies had been bottled up in committee for the last year as members of Congress tried to gain special highway projects in their own districts. Lawmakers who stalled release of the funds claimed the projects were necessary to improve local transportation, but critics called the projects classic examples of "pork barrel" politics.

Most of the $7.2-billion will be targeted towards completion of the federal Interstate system. As of September 1970, more than 96% of the system was finished, but stretches in only seven states (Delaware, Nebraska, North Dakota, Rhode Island, South Dakota, Vermont and Wisconsin) were 100% completed.

A large portion of the extra funds for highway construction and repairs has come from the Surface Transportation Assistance Act of 1982, which tacked an extra 5¢ gal. tax on gasoline. The Highway Users Federation, a Washington, D.C.-based group funded by the automobile industry and allied industries, claims the 1982 tax has doubled the amount of highway repairs and new construction in states.

it has been doing. "But a large part of it is likely to go toward assets acquisitions—either in many small transactions or possibly a major ($2-billion to $5-billion) purchase," Salomon Brothers says.

The brokerage firm was a bit stronger in Shell's case. It says it expects the full $7-billion to be used for asset acquisitions "including at least one very large purchase in the U.S.," using its domestic subsidiary, Shell Oil Co., as the vehicle to carry it out.

The study assumes continued erosion in the price of crude oil—to $27 in 1985, $25 in 1986 and $24 in 1987. It also anticipates a decline in the dollar rate in 1986 and 1987. **NPN**

Federal Loan Measure, ITC Probe of Imports Good News for Ethanol

President Reagan has signed legislation giving the Department of Energy until Sept. 30 to negotiate loan guarantees for four fuel ethanol plants.

Deadlines for DOE negotiations on two of the projects had already passed last Dec. 31, while negotiations for the other two proposed plants were also set to expire when Reagan approved the extension.

Extensions of the negotiation timetable does not necessarily mean DOE will approve the loan guarantees. Congress, however, has made it clear that it hopes the program will spur ethanol production in the U.S.

The extension involves four proposed ethanol plants: Agri-Fuels Refining, a 35-million-gal./year plant in New Iberia, La.; New England Ethanol Producers, a 25-million-gal./year plant in Auburn, Maine; Minnesota Alcohol Producers, a 20-million-gal./year plant in Mankato, Minn.; and Circle Energy, a 16.5-million-gal./year plant in Blair, Neb.

DOE has already approved 90% construction loan guarantees for two ethanol plants. New Energy Company of Indiana received a $140-million guarantee for a 50-million-gal./year plant in South Bend, Ind., which is scheduled to begin operations this summer. Tennol Inc. received a $72-million guarantee for a 25-million-gal./year plant scheduled for opening in early 1986.

Meanwhile, Brazilian ethanol lost a round to the U.S. International Trade Commission over alleged dumping in the U.S. In what was billed as a "preliminary determination," the ITC unanimously voted to have the Department of Commerce expand its probe of whether Brazil is subsidizing its ethanol industry or selling the product in the U.S. at less than fair market value. Archer Daniels Midland, a major U.S. producer of ethanol, is fighting to have higher tariffs placed on Brazilian ethanol. **NPN**

Sun Starts Cranking out Unleaded 'Muscle' Grade

It's sort of loose-knit and tricky the way the whole thing is set up, but a Sun unit has a 98-octane unleaded gasoline on the market.

The fuel is manufactured primarily for racing cars, but it can be bought at a few retail stations here and there—all you have to do is find them. The price is rather stiff too—$3 or more a gal.

The super-octane gasoline is manufactured at Sun's Marcus Hook refinery by its ARD unit, which used to be the old Sun Technology division before the company was restructured. It is not sold as a Sunoco-branded product but under its own label of Cam 2GT, another refinement of its Cam 2 leaded gasoline, which runs as high as 110- and 115-octane for racing cars.

The high-octane gasoline is sold to a small group of distributors who specialize in servicing racing tracks around the country. Sun, along with Union and a handful of smaller companies, are the only ones who make the super-gasolines for the high-speed racers.

"Once we sell it to the distributors, they can sell the gasoline to anyone they choose," a Sun spokesman said. "It cannot be sold as a Sun product in Sunoco pumps, however. We know some distributors do sell it to some retail stations who promote it as a high-priced specialty fuel at their stations" [*NPN*—Feb '85, p44].

The Sun spokesman said that supplies of the high-octane fuels, leaded or unleaded, are limited because they require very high-cost ingredients, which are not always available. The retail price of $3 or more per gal. isn't likely to whet the appetities of most motorists, either; except for the novelty effect.

Sun thus has no plans to introduce the 98-octane unleaded gasoline into its normal market structures.

Sun also said that its Cam 2, which has a lead content of 4 grams/gal., will be withdrawn from all retail markets July 1 when the Environmental Protection Agency's new phasedown rules go into effect. **NPN**

(continued on page 34)

First-Quarter Earnings Slump, But Most Made Some Money

	Corporate	(millions)		Downstream		
Company	1st Qtr. 1985	1st Qtr. 1984	% Change	1st Qtr. 1985	1st Qtr. 1984	% Change
Exxon	$1,325.0	$1,475.0	(10.2%)	$13.0	$16.0	(18.8%)
Mobil	320.0	380.0	(15.8)	(11.0)	(11.0)	—
Texaco	320.0	321.0	(0.03)	(27.0)(b)	(38.0)(b)	—
Chevron	354.0	378.0	(6.3)	(25.0)	(45.0)	—
Amoco (a)	473.0	594.0	(20.4)	2.0	22.0	(90.9)
Shell	296.0	326.0	(9.2)	8.0	34.0	(76.4)
Arco	352.0	395.0	(10.9)	35.0	30.0	16.7
Tenneco	63.0	155.0	(59.4)	NA	NA	NA
Sohio	343.0	381.0	(10.0)	52.0(b)	64.0(b)	18.8
Phillips	106.0	193.0	(45.1)	(6)	28	—
Sun	127.0	143.0	(11.2)	20.0	13.0	53.8
Unocal	180.7	180.1	(0.03)	NA	NA	NA
Amer. Hess	37.2	88.4	(57.9)	NA	NA	NA
Dia. Shamrock	59.1	59.6	(0.08)	15.3	8.8	74
Ashland (c)	14.1	5.0	182.0	15.9	5.1	212
Kerr-McGee	28.4	40.3	(29.5)	(13.7)	1.4	—
Pennzoil	57.4	69.2	(17.1)	NA	NA	NA
Murphy	20.2	26.3	(23.2)	2.0	3.6	(44.4)
Amer. Petrofina	(2.7)	10.3	—	NA	NA	NA
Southland	1.0	14.0	(93.0)	NA	NA	NA

(a) Formerly Standard of Indiana.
(b) Downstream earnings are worldwide.
(c) Ashland's are 2nd quarter; fiscal ends 9/30; first half are $40.0 versus $32.2 for an increase of 24.2%.

First-quarter earnings for top oil companies were generally on the soft side, reflecting the excess supply and low prices that prevailed during that period.

Some were close to the break-even point, notably Texaco, Unocal and Diamond Shamrock. But others had losses compared with last year ranging up to Tenneco's 59.4%. Phillips, which twice escaped the clutches of raiders, posted a loss of 45% and said much of it reflected the high cost of fighting the wars.

In the downstream refining-marketing world, Arco, Sohio and Sun were among the few to emerge with higher nets than the first quarter of 1983. **NPN**

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July 1985

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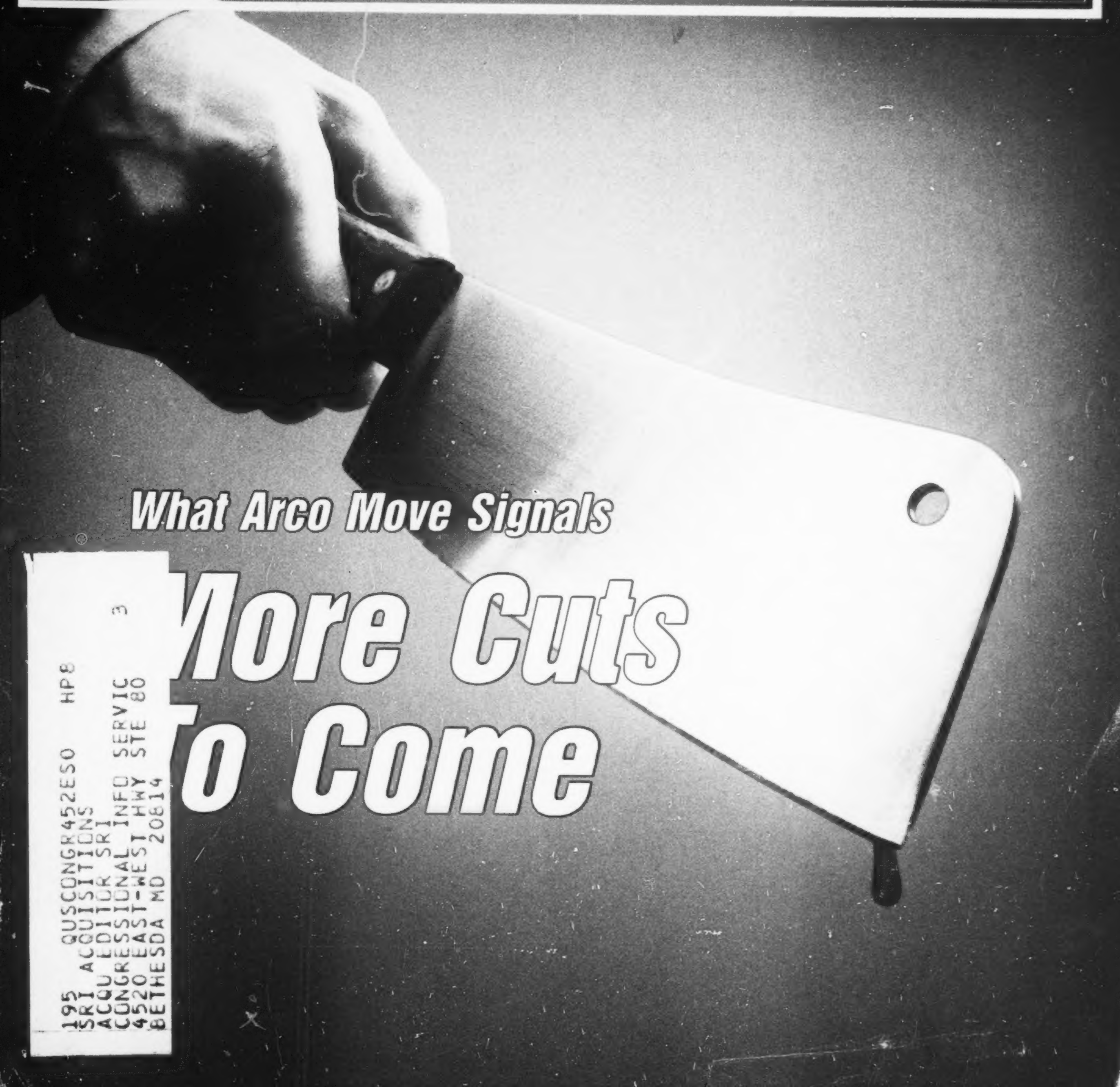
Why C-Store Owners Like Fast Foods
How the Players in East Keep Changing
Has Unocal Victory Cooled Merger Fever?

NPN
National Petroleum News



What Arco Move Signals

More Cuts To Come

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NATIONAL PETROLEUM NEWS

JULY 1985 VOL. 77 NO. 7

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In spite of all the heart-wrenching shrinkage that the oil refining and marketing industry has undergone since 1981, the shakeout isn't over by a long shot. Even greater trauma may lie ahead. **Page 36**

Ask any 10 gasoline marketers who operate convenience stores what is the hottest C-store new trend, and the likely answer will be "fast foods." But ask the same group to name the most costly trap an operator can fall into, and again, the likely answer will be fast foods. **Page 46**

Atlantic Richfield's decision to walk away from its past, present and future in the East means that it not only has come full circle, but also that change will continue to be a reflection of the volatility of oil marketing. **Page 41**

• TRENDS

Unocal Cools Merger Fever; Takeovers Tougher Now?

Long after the dust has settled and T. Boone Pickens is remembered mostly as "that raider fellow from Texas," oil men undoubtedly will still be singing the praises of Unocal's Fred Hartley as the man who beat him in a takeover battle and, in so doing, restored a sense of balance and perspective to an industry half-traumatized and half-mesmerized by a never-before-seen acquisition bloodbath.

Equally tough-minded Armand Hammer, the octogenarian chairman of Occidental Petroleum Corp., put his finger on the button with this comment: "Fred Hartley deserves a Nobel Prize for his courage and his determination to ward off an attack by raiders. This will send a signal to all future raiders."

Hartley, 68, is chairman and CEO of Unocal Corp., which Pickens and a group of big-money financiers and Wall Street enthusiasts tried to take over in a series of pressure plays similar to those that worked so well against Gulf Oil, Phillips and others in the past, and which netted him and his associates hundreds of millions of dollars [*NPN*—May '85, p33].

Hartley successfully fought off Pickens' attempts to postpone the company's annual meeting and, after losing in the lower court, won an appellate court decision in Delaware that excluded Pickens' stock from a $72-per-share buyback offer by the company.

With Hartley holding all the trump cards, Pickens was forced to negotiate his way out as best as possible. This time he took a financial drubbing—at least $20-million by his own count and perhaps as much as $100-million to $200-million by other industry and financial-circle calculations. Pickens also is compelled to hold on to two-thirds of the Unocal shares he bought in his $1.2-billion campaign until early 1986. This will tie up his credit line and a half-billion-dollars worth of high-interest money he borrowed to help finance the deal. Outwardly Pickens maintained an optimistic posture, but financial circles considered it a serious defeat.

The settlement prompted the *Wall Street Journal* to headline a follow-up story: "Golden Era for Raiders May Be Waning: Unocal-Mesa Pact, Court Setback Curbing Takeover Fever." The article noted that "Future raiders may have to make offers available to all holders, possibly in cash, and also may have to demonstrate an intention to actually run a company they threaten."

Some sources said that if the Delaware court decision, which affirmed the right of an embattled board to deny benefits to potential raiders, had been on the books before the Phillips and Gulf acquisition fights, the end results might have been different.

All in all, however, it now appears that takeover specialist Pickens has been forced to the sidelines for the time being.

Unocal, as a result of the costly battle with Pickens, is in the process of restructuring itself physically and financially. But it was not hurt as badly as Phillips, which was forced to take aboard an enormous debt load, or as much as Gulf or Getty, which were acquired by white knights Chevron and Texaco.

The end is not yet in sight for oil industry mergers and acquisitions. Some of the second- and third-tier companies with good crude oil reserves or strong marketing positions and facilities could be targets of expansion-minded superiors.

But even these conquests will be much tougher. For example, Amerada Hess and Sun, both of which have been mentioned frequently as possible takeover targets, have changed their bylaws and their structures in such ways as to make them less vulnerable and more expensive to eager suitors. Even Mobil has repositioned itself and is in the process of spinning off properties which might be more harmful than helpful if a challenge should arise.

—J. Richard Shaner

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

APRIL	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.199	$1.119	$1.205	$1.340
Regions:				
Northeast	1.189	1.100	1.178	1.316
North Central	1.205	1.138	1.223	1.360
South	1.180	1.096	1.180	1.332
West	1.228	1.140	1.240	1.382

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	5/31/85	6/1/84
Gasoline (total)	215,039	252,394
Gasoline (unleaded)*	104,770	104,015
Jet Kerosine	34,484	34,437
Distillates	104,596	99,583
Residual	43,135	47,941

**Included in gasoline total.*
Source: American Petroleum Institute.

By Mark Emond
WEST COAST

Arco Data Shows Market Share Gain From Low-Balling May Have Limits

Atlantic Richfield's gasoline market share, which jumped spectacularly after the company dropped its credit card and slashed prices in April 1982, has leveled off and may be declining on the West Coast, the latest data shows.

This conclusion is based mainly on an analysis of first-quarter taxable gasoline sales in California from 1982 to 1985, as compiled by Lundberg Survey, North Hollywood, Calif.

This is the first time a three-year, before-and-after comparison can be made on a quarterly basis. The first quarter of 1985 is the latest quarter available. The first quarter of 1982 was the last three-month period before Arco's new policy took effect.

As the table shows, the market share increase by the first quarter of 1983 was very impressive, and less so but still strongly positive by first-quarter 1984, and then negative a bit by the first quarter of this year.

Whatever the current trend may be, it is surely a remarkable achievement that Arco's market share grew a cool 5.25 percentage points, from 10.94% in the first quarter of 1982 to 16.19% in the same period this year.

But the latest evidence seems to indicate that perhaps a price-cutting campaign of this sort reaches saturation. Growth has been slowing from year to year, and, in fact, turned to a decline the past year, −0.27 of a point by the first quarter of 1985 from 16.46% a year earlier, although Arco was considered very competitive in California throughout the period.

In another report, Arco's market share in the greater Los Angeles area declined to 18.92% in May 1985 from 19.28% a year earlier, according to Whitney Leigh Corp., Marina Del Rey, Calif. Based on a panel of 450-plus stations, Arco's average monthly throughput per station fell to 144,000 gal. in May from 160,000 a year earlier.

California is substantially the West, and Los Angeles is half of California. Arco markets in five western states (California, Oregon, Washington, Arizona, and Nevada), but California represents two-thirds of total taxable gasoline sales in the entire PAD 5. In 1984, California gasoline sales were 11.4-billion gal., compared with 17.1-billion in PAD 5, according to Lundberg Survey.

Next to Arco, Shell shows a gain of 1.48 points during the period. Texaco also has an increase during the period, 1.40 points, mostly in early 1974 because of the acquisition of Mohawk Petroleum in the Getty merger.

Only two majors showed a decline during the period, Mobil and Exxon. Overall, majors picked up 2.07% market share from independents and others, mostly because Mohawk's volume was switched from independent to major.

At Arco, there's been a change of the guard at the vice-presidential level affecting retail, and the company's marketplace tactics bear watching, particularly as the company has announced the intention to do all of its petroleum marketing on the West Coast as soon as it can pull out of the East.

California Gasoline Market Share 1st Quarter 1982-1985

	1982	1983	1984	1985
Arco	10.94%	14.91%	16.46%	16.19%
Chevron	15.13	14.79	15.61	15.33
Shell	12.81	14.37	13.86	14.29
Union	12.44	12.07	12.84	13.09
Mobil	8.62	7.31	7.40	8.36
Texaco	4.74	5.07	7.18	6.14
Exxon	5.25	4.70	5.37	5.22
Majors	78.45	78.30	79.83	80.52
Indep. & other	21.55	21.70	20.17	19.48
Total	100.00	100.00	100.00	100.00

Source: Lundberg Survey

Tosco Stock Rating Up, Sale Prospects Better

By the time this column reaches the street, events involving Tosco Corp., Santa Monica, Calif.-based independent, may have taken place, or may still be waiting to happen, if they will happen at all. In any case, the company's prospects took a turn for the better in late May as perceptions in the stock market changed.

With Tosco shares going for about $1.50, Duff & Phelps, Chicago, a high-powered investment research and consulting service, issued a positive analysis based in part on the fact that on July 1, 1985, a federal court order banning the sale of Tosco's refineries and other assets to a wide list of oil companies would cease to exist.

The existence of the 10-year court order has been known, of course, although perhaps not widely, but the association between it and a possible buyer became more widely understood in investment circles as a result of the Duff & Phelps recommendation.

When the court ordered Phillips in 1975 to divest the properties it had acquired from Tidewater on grounds the acquisition had reduced competition, it forbade resale to a long list of oil companies. That list included just about everybody who might now be able to buy Tosco, which is deeply in debt and, in essence, owned by a group of banks.

Tosco was not on the court's no-no list of oil companies, and decided to buy the assets. Tosco reorganized, pulling out of retail, and tried to do other things to make the system profitable, but to no avail.

A couple of years ago, heavily in debt and sinking deeper daily, the banks restructured the debt to make it possible for Tosco to stay in business for a while, perhaps until better times. Meanwhile, the assets were for sale, but the court order stood as a formidable obstacle: Practically any oil company with the reason and financial strength to take over Tosco was banned from doing so.

Whether the banks decided to hang on at least until July 1, 1985, because they knew something or hoped something, isn't known. But Duff & Phelps took note of the possibility, and in a few days in May, Tosco's languishing shares doubled in value and trading volume increased markedly.

Then, E. F. Hutton raised its recommendation from "don't buy" to "hold" pumping more enthusiasm into the market.

Duff & Phelps felt the stock was a good prospect, from the downside of only $1.50 per-share up to more than $5 a share in the case of a sellout. This is based on total shareholder equity of $120-million against 23.8-million shares.

As for upside potential, Tom Lewis, VP

O&E Briefs

Liability Costs Soar, Companies Drop Out

Panic over the possibility of costly liability claims from underground storage tank leaks continues to cause insurance rates to soar and some potential buyers to back off from purchasing used service stations.

Petroleum equipment distributors are finding, as has been the case with oil jobbers, that their costs for business insurance are soaring out of sight.

According to the Petroleum Equipment Institute's newsletter, its distributor members recently have been quoted insurance renewal costs ranging from two to four times higher than their premiums a year ago. In addition, some members are discovering that insurance underwriters who traditionally have carried their liability coverage are no longer interested in their business.

Some underwriters, according to the PEI newsletter, "have become so skittish about the scope of exposure resulting from pollution that they are withdrawing completely from coverage of any business activity that might cause pollution."

PEI had sought to get Firemen's Fund to provide special coverage for its members, but after a two-month study, Firemen's "elected not to proceed with the program." PEI also studied organizing a captive insurance company but decided "the captive could not hope to generate the millions of dollars on its own to cover potential claim losses."

Some equipment distributors reportedly have started adding an insurance surcharge to each service invoice to help offset the skyrocketing insurance costs. Others are adding a percentage insurance surcharge to their installation quotations, reports the newsletter.

Meanwhile, some potential buyers of old service stations are becoming somewhat wary of possibly acquiring liability problems along with such properties. Gene Horne of Pantry Inc., a Sanford, N.C.-based C-store chain, told a Society of Independent Gasoline Marketers of America seminar recently that his company was now shying away from buying and converting old stations into C-stores for this reason.

EPA Proposes Own Tank Reporting Regs

Owners of underground storage tanks would be required to specify the age, size, type, location and use of all tanks under a regulation proposed in late May by the U.S. Environmental Protection Agency.

The proposal, which is subject to a comment period ending July 15, is less stringent than tank registration plans proposed in a number of states. California, for example, is planning to require tank owners to supply information regarding the thickness of the tank and whether it is lined, double-walled, single-walled or wrapped.

An EPA staffer said the agency proposal is designed "to make it as less cumbersome as possible. Ours is the easiest form."

Congress ordered EPA officials to come up with a tank registration program last year when it passed amendments to the Resource Conservation and Recovery Act (RCRA). Under RCRA, tank owners must file tank forms with states or local officials by May 8, 1986.

The EPA proposal will require two forms: one for existing and future planned tanks, and the other for tanks taken out of operation since Jan. 1, 1974. Owners of tanks no longer in service but which are still located on the grounds are required to provide the following information: the date the tank was taken out of operation; the age of the tank when it was taken out of operation; the size, type and location of the tank; and the type and quantity of substances left stored in the tank.

In most cases, tank owners will be able to answer questions on the EPA forms simply by checking a box, agency officials said.

Private Fleet Survey: Tank Trucks Cost More

If a jobber operates his own fleet of tank trucks, it's probably costing him more per mile of operation than fleet operators in other industries.

According to A.T. Kearney Inc., of Chicago, in its latest private fleet cost survey, done in conjunction with the Private Truck Council of America, the average tank truck cost $1.62 per mile to operate in 1984. That's up from $1.50 per mile in 1983.

	1984	1983
Cost/mile:		
Tank trucks	$1.62	$1.50
Average	$1.32	$1.29
Number/fleet:		
Tank trucks	28	55
Average	37	41
Tractor miles/yr.:		
Tank trucks	87,400	80,200
Average	100,600	97,000
Miles/trip:		
Tank trucks	389	266
Average	921	888
% miles empty:		
Tank trucks	44%	46%
Average	21%	21%
Tractor age (yrs.):		
Tank trucks	3.2	3.8
Average	3.1	3.3

Tank trucks were more expensive to operate on a per-mile basis than other types of trucks mainly because they run more miles empty, the study says. Tank trucks ran about 44% of their mileage empty, while the industry average for empty miles was 21%.

Although the number of tank trucks per fleet dropped from 55 in 1983 to 28 last year, the trucks were on the road more. The survey showed average annual tank truck mileage for 1984 was 87,400, up from 80,200 the year before.

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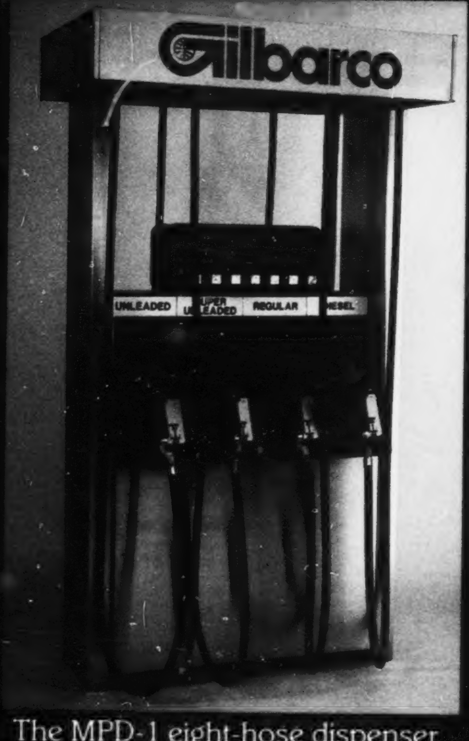

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Looking Things Over

Something we've always wanted to do in our own right is getting off the ground in this issue of *NPN Factbook*. It is our very own Share-of-Market Report, and we have high hopes and ambitions for it as an annual feature in future issues.

This year we are introducing *NPN's* share-of-market data for the top 12 companies, broken down along traditional lines, i.e. total gallonage and national market share. Next year, if all goes well, we hope to come back with an expanded version of this report so that once again the *NPN* market share numbers will be the most authoritative around.

Our formula for this year's Share-of-Market Report differs from others that have been available in the past—ours is based on the *total* gasoline sales of the principle gasoline suppliers. In other words, we are working from the amounts of gasoline they sold as automotive fuels back upstream. The measurements are on a refinery-gate basis, not from a retail pump viewpoint. Thus, we have reason to believe that the *NPN* data is a more accurate reflection of gasoline marketing and share-of-market rankings than anything else around.

There's a lot of new data elsewhere in the *Factbook*. For example, we have some interesting pricing data from the Bureau of Labor Statistics. And, we have, for the first time, some intriguing regional share-of-market perspectives for both the U.S. and Canada from MPSI Americas Inc. of Tulsa, Okla. For fuel oil marketers there are some profiles from our sister publication, *Fuel Oil News*. And, from Hunter Publishing Co. comes the Service Job Analysis, the triennial in-depth survey of the auto repair/maintenance market.

As always, this year's *Factbook* is the end result of tireless efforts by our data-gathering guru and executive editor J. Richard Shaner. We are indebted to his many long hours, scores of telephone calls and pages upon pages of number crunching. Thanks also to production coordinator Timothy R. Green, who rounded up the distribution and retail outlet numbers and assembled the issue's masses of data in a readable and presentable fashion.

All in all, the 1985 *Factbook* is an especially valuable reference book for industry, government, statisticians and all other users. —*Marvin Reid*

National Petroleum News (NPN) (ISSN 0149-5267) is published monthly by Hunter Publishing Co., 950 Lee Street, Des Plaines, Illinois 60016. (312) 296-0770.

Second class postage paid at Des Plaines, Illinois and additional mailing offices.

Subscriptions are solicited only from executive, management and supervisory personnel at the supplier and wholesale level of oil marketing, engaged in the distribution, merchandising, transportation and storage of petroleum, TBA products, and convenience-store items. Position, company and segment of industry must be indicated on subscription orders.

Basic subscription rates for one year to individuals in the petroleum marketing industry are: U.S. $44; Canada $53 (U.S. $); Elsewhere $84.50 (U.S. $). Non-industry personnel rates for one year are: U.S. $59; Canada $64.50 (U.S. $); Elsewhere $96 (U.S. $). Single copies: $4.50 U.S. Mid-June Factbook issue, $35 in the U.S.; $45 in Canada. The publisher reserves the right to accept or reject any subscription. (R) Title registered in U.S. patent office. Send change of address notice, correspondence regarding subscription service or subscription orders to: Circulation Department, NATIONAL PETROLEUM NEWS, 950 Lee Street, Des Plaines, Illinois 60016. Subscribers should notify Circulation Department promptly of any change of address, giving old as well as new address. If possible, enclose an address label from a recent issue of the magazine. Or call (312) 296-0770, 9 a.m. to 4 p.m. CST. Allow one to two months for change to become effective.

Postmasters: Send form 3579 to NATIONAL PETROLEUM NEWS, 950 Lee Street, Des Plaines, Illinois 60016.

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Established in 1909

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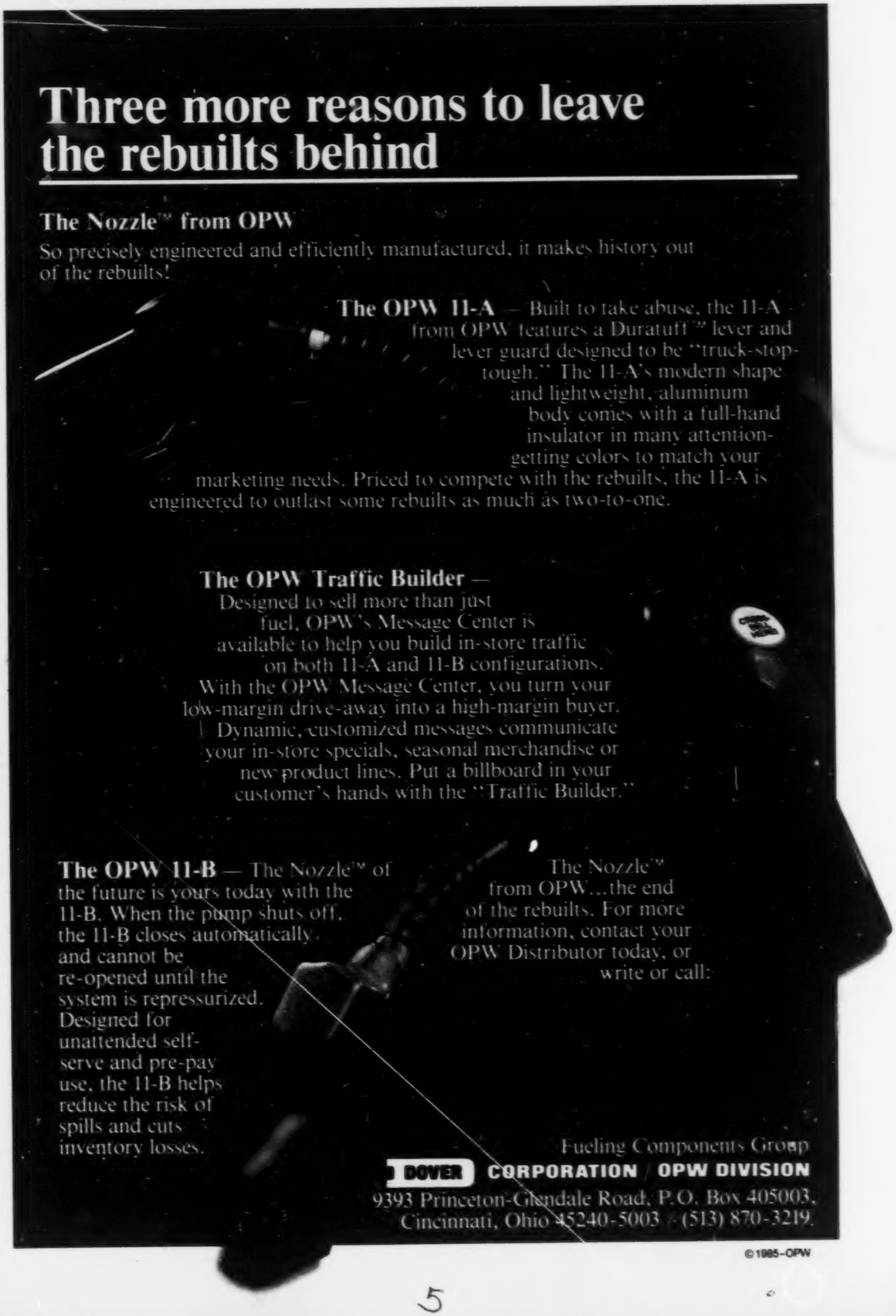

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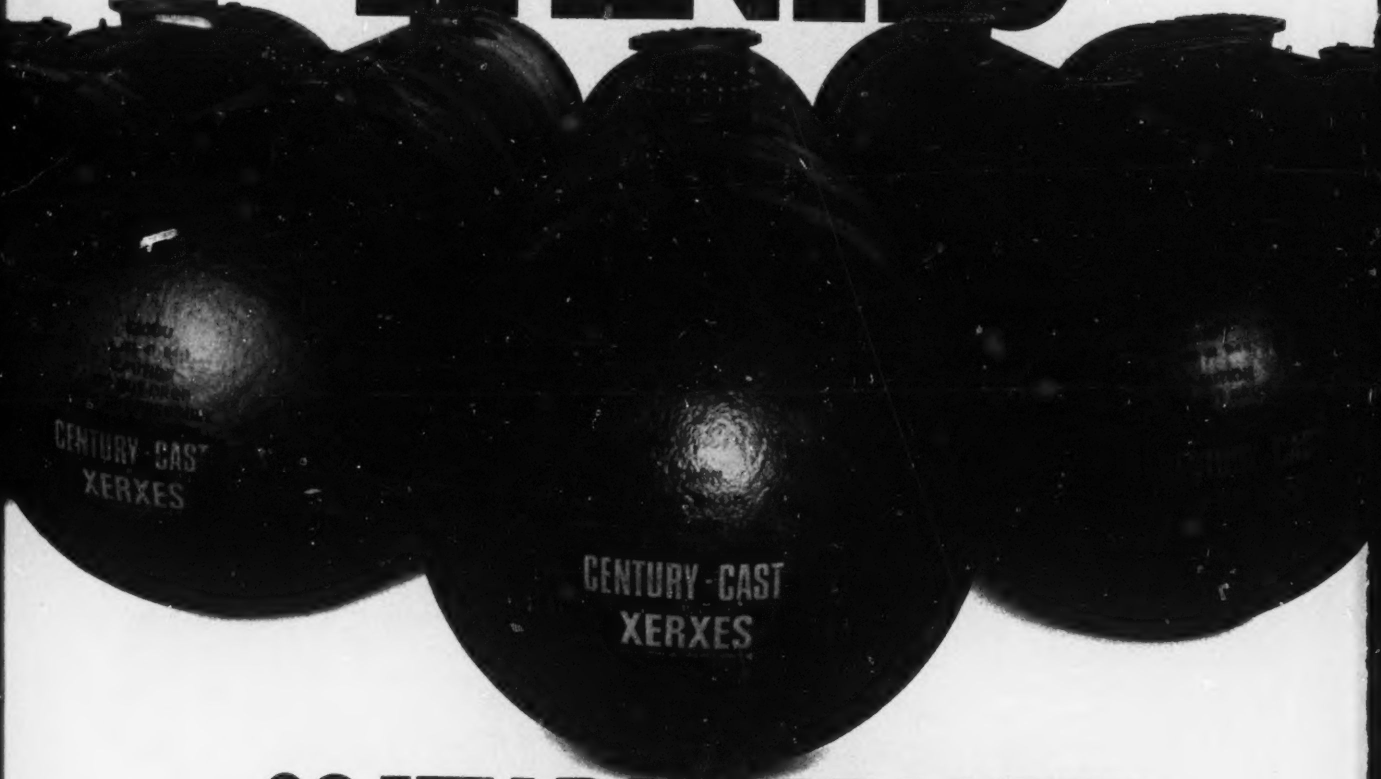
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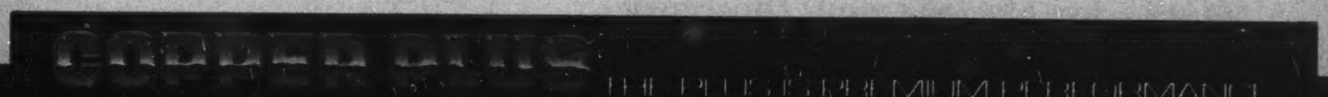

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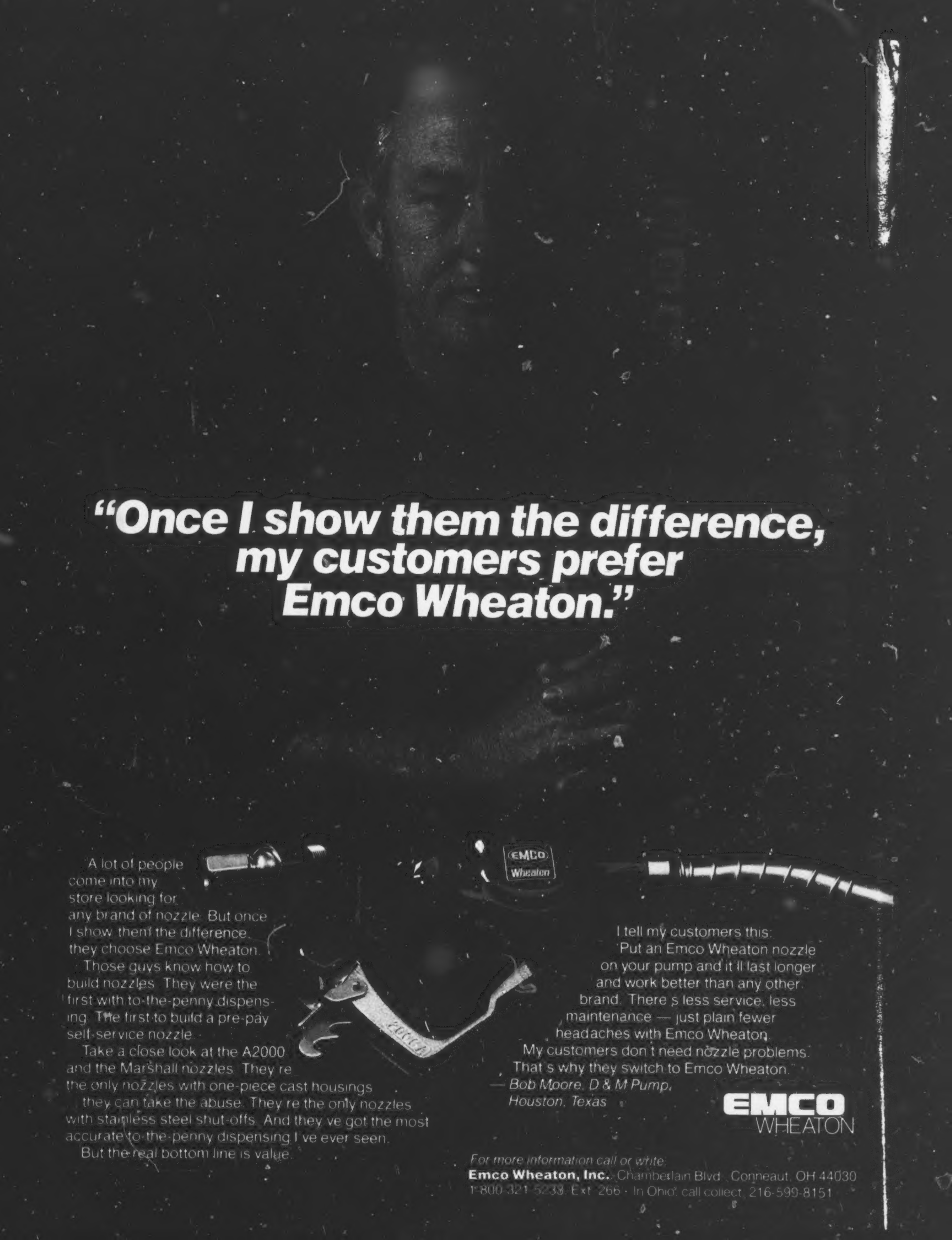
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— Bob Moore, D & M Pump,
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Ranking the Top Marketing Companies

	Total Assets		Total Sales		Net Income		Net Sales Ranking Among 500 U.S. Corporations	
	1984	1983	1984	1983	1984	1983	1984	1983
Exxon Corp.	1	1	1	1	1	1	1	1
Mobil Oil Corp.	2	2	2	2	6	7	3	3
Texaco Inc. (a)	3	3	3	3	5	8	6	6
Chevron (b)	4	5	5	5	4	4	11	9
Standard Oil (Indiana)	5	4	4	4	2	2	10	8
Shell Oil Co.	6	7	7	7	3	3	13	13
Atlantic Richfield Co.	7	6	6	6	10	5	12	12
Tenneco Inc. (c)	8	9	9	10	9	11	19	19
Standard Oil (Ohio)	9	10	11	11	5	6	24	25
Phillips Petroleum Co.	10	11	8	8	7	10	17	16
Sun Co.	11	12	10	9	11	14	20	17
Unocal	12	14	12	12	8	12	27	31
Amerada-Hess Corp.	13	15	13	13	14	15	41	39
Diamond Shamrock Corp.	14	16	15	15	13	21	83	89
Ashland Inc. (d)	15	17	14	14	19	19	42	45
Kerr-McGee Corp.	16	18	16	16	17	18	111	108
Pennzoil Corp.	17	19	17	18	15	16	147	163
Murphy Oil Corp.	18	20	19	17	16	17	167	157
American Petrofina	19	21	18	19	18	20	173	176

(a) Includes Getty Oil (ranked 13th in 1983) acquired 2/17/84.
(b) Includes Gulf Oil (ranked 8th in 1983) acquired 6/15/84.
(c) Corporate; includes Tenneco Oil Co.
(d) Fiscal ends 9/30
Source: *Fortune*, 500 largest U.S. corporations, April 29, 1985.

Old Order Changes—The Ranks Thin Out

There is no question that Exxon is the nation's No. 1 oil company. With assets of $63.2-billion, sales of $90.9-billion and net earnings of $5.5-billion in 1984, its physical and financial dimensions are so big that it simply dominates everything in sight.

Ranking the other oil companies is always a touchy question, however. *NPN Factbook* uses assets as its key determining factor; business/financial publications use annual sales, but those move up and down so much that they lack real benchmark substance. The same applies to the utilization of net profits as a yardstick.

There were two significant changes in the 1984 standings: Chevron, with its acquisition of Gulf, moved past Standard of Indiana to the No. 4 position, and Shell displaced Atlantic Richfield as No. 6. The Texaco/Chevron/Amoco/Shell positions may be revised again later this year, however, as the dust settles on the Getty and Gulf acquisitions and the required divestitures are firmly locked in place.

Mergers and megamergers continued to change the face of the oil industry in 1984. At this point in time, there are only 19 oil marketing companies left with assets of more than $1-billion. Getty and Gulf fell by the wayside in 1984, and Citgo, Marathon and Conoco did likewise in years previous.

Phillips Petroleum almost became a victim of the merger mania in late 1984 and early 1985 when financial "entrepreneurs" mounted hostile takeover campaigns against it. Phillips survived both seiges, but at a price that will force it to trim its sails significantly. There was talk in some circles that Phillips may have to sell off some of its marketing facilities to pay the bills.

Market raiders launched an attack on Unocal Corp. in early 1985, and this one seesawed back and forth through the first half of the year with neither side conceding an inch to the other. According to Wall Street appraisals, the spread of takeover fever will hinge on the outcome of the Unocal fight. If Unocal wins, the forces of the raiders will be blunted sufficiently to bring about a quick easing of the fever. If Unocal loses, then no oil company will be safe—not even an Exxon, despite its wealth and size.

Classified as "sitting ducks" by the financial community were companies such as Amerada Hess, Sun, and Diamond Shamrock. Others were named too, and there was a rash of anti-takeover bylaws and procedures adopted by many companies, including Mobile, Sun and Hess.

Six companies earned more than $1-billion in 1984—two less than the preceding year. They were Exxon, Mobil, Amoco, Chevron, Shell and Sohio.

Oil Company Annual

	Gross Sales-Operating Revenues (a)				Net Income	
	(add 000)		% Change		(add 000)	
	1984	1983	1984 vs. 1983	1984 vs. 1979	1984	1983
Amerada Hess Corp.	$ 8,353,752	$ 8,422,076	0.8%	22.6%	$ 170,455	$ 205,347
American Petrofina	2,125,853	2,069,122	2.7	33.9	45,092	55,260
Ashland Inc.	8,500,000	8,108,000	4.8	26.1	(172,000)(b)	97,000
Atlantic Richfield Co.	24,654,000	24,912,000	−1.0	47.8	567,000	1,548,000
Chevron Corp.	27,830,000	28,411,000	−2.0	−10.0	1,534,000	1,590,000
CITGO Petroleum Corp. (c)	5,427,092	2,764,257	96.3	—	15,498	22,719
Crown Central Petroleum Corp.	1,612,236	1,668,345	−3.4	—	504	4,024
Diamond Shamrock Corp.	4,483,200	4,026,107	11.4	362.6	242,200	(56,163)
Exxon Corp.	97,288,000	93,447,000	4.1	14.7	5,528,000	4,978,000
Kerr-McGee Corp.	3,537,000	3,507,650	0.8	30.8	65,000 (d)	118,412
Marathon Oil Corp. (e)	10,185,000	9,278,000	9.8	—	1,274,000	1,138,000
Mobil Oil Corp.	60,474,000	58,998,000	2.5	32.9	1,268,000	1,503,000
Murphy Oil Corp.	2,264,652	2,448,158	7.4	41.9	96,167	127,436
Phillips Petroleum Corp.	15,756,000	15,411,000	2.2	61.7	810,000	721,000
Shell Oil Corp.	20,898,000	20,705,000	0.9	43.7	1,772,000	1,633,000
Standard Oil Co. (Indiana)	29,008,000	27,635,000	5.0	55.9	2,183,000	1,868,000
Standard Oil Co. (Ohio)	12,251,000	12,067,000	1.5	54.8	1,488,000	1,512,000
Sun Co.	15,397,000	15,523,000	−0.8	44.4	538,000	453,000
Tenneco	14,890,000	14,499,000	2.6	37.2	631,000	716,000
Texaco Inc.	47,935,000	40,068,000	19.6	22.6	306,000 (f)	1,233,000
Union Oil Co. of California	11,530,700	10,690,500	7.9	52.4	700,400	625,900

(a) Excluding taxes

(b) Operating income (ex-taxes/interest) was $252,000,000 before write-offs.

(c) Owned by The Southland Corp. Figures are for gasoline refining and supply segment only—includes refining, marketing and transportation operations of Citgo Petroleum Corp. and the Gasoline Supply Division.

	Product Imports b/d		Crude Imports b/d		Net Crude Production b/d			
					Domestic		Foreign	
	1984	1983	1984	1983	1984	1983	1984	1983
Amerada Hess Corp.	—	—	—	—	66,983	74,124	92,280	80,451
American Petrofina	—	—	—	—	18,838	18,197	—	—
Ashland, Inc.	—	—	—	—	2,508	2,677	19,080	14,066
Atlantic Richfield Co.	—	—	—	—	654,800	652,800	58,087	41,900
Chevron Corp.	—	—	—	—	583,000	353,000	1,057,000	1,018,000
CITGO Petroleum Corp. (g)	—	—	—	—	—	—	—	—
Crown Central Petroleum Corp.	—	—	—	16,394	3,249	3,833	—	—
Diamond Shamrock Corp.	—	—	—	—	73,336	31,963	—	21,500
Exxon Corp.	—	—	—	—	778,000	781,000	835,000	746,000
Kerr-McGee Corp.	—	—	—	—	19,500	25,805	23,000	15,491
Marathon Oil Co. (h)	—	—	—	—	163,300	157,300	111,200	89,400
Mobil Oil Corp.	—	5,000	—	127,000	388,000	304,000	381,000	287,000
Murphy Oil Corp.	—	—	—	—	13,734	15,026	40,074	45,660
Phillips Petroleum Corp.	—	—	—	—	136,000	127,000	132,000	127,000
Shell Oil Co.	—	—	—	—	680,000	626,000	173,000	202,000
Standard Oil Co. (Indiana)	—	—	—	—	409,000	403,000	440,000	383,000
Standard Oil Co. (Ohio)	—	—	—	—	634,437	612,002	0	0
Sun Co.	—	—	—	—	159,000	170.700	28,900	28,800
Tenneco	—	—	—	—	89,050	77,634	38,392	37,997
Texaco Inc.	—	—	—	—	698,000	393,000	1,678,000	1,615,000
Union Oil Co. of California	—	—	—	—	152,000	152,900	83,000	73,100

(g) Owned by The Southland Corp. Figures are for gasoline refining and supply segment only—includes refining, marketing and transportation operations of Citgo Petroleum Corp. and the Gasoline Supply Division.

(h) Owned by United States Steel—figures are for oil and gas segment only.

Reports for 1984

Net Income		Net Income % of Gross Sales		Total Assets				Net Income as % of average stockholder equity	
% Change				(add 000)		% Change			
1984 vs. 1983	1984 vs. 1979	1984	1983	1984	1983	1984 vs. 1983	1984 vs. 1979	1984	1983
−17.0%	−66.4%	2.0 %	2.4 %	$6,352,832	$6,217,098	2.2%	29.7%	6.6%	8.1%
18.4	−33.6	2.1	2.6	1,705,625	1,399,268	21.9	57.9	6.8	9.4
−277.3	−132.7	—	1.2	4,036,941	4,108,000	1.7	29.7	—	—
−63.4	−51.4	2.3	6.2	22,130,000	23,282,000	−4.9	59.9	—	14.9
−3.5	−14.1	5.5	5.6	36,358,000	24,010,000	51.4	100.8	—	—
−31.8	—	0.28	0.79	1,245,865	1,392,278	−10.5	—	—	—
−87.5	—	0.03	0.24	528,682	652,947	−19.0	—	—	—
531.2	39.9	5.4	—	5,396,400	6,024,400	−10.4	124.9	—	—
11.0	28.7	5.7	5.3	63,278,000	62,963,000	0.5	27.9	19.0	17.2
−45.1	−59.4	1.8	3.4	3,771,000	3,806,934	0.9	57.2	3.7	7.0
11.9	—	12.5	12.2	9,949,000	9,332,000	6.6	—	—	—
−15.6	−36.8	2.1	2.7	41,851,000	35,072,000	19.3	52.2	9.3	10.8
−24.5	−7.1	4.2	5.2	2,685,069	2,792,142	−3.8	43.0	9.5	13.1
12.3	−9.1	5.1	4.7	16,965,000	13,094,000	29.6	99.2	12.2	11.7
8.5	57.4	8.4	7.9	23,729,000	22,169,000	7.0	47.1	14.1	14.3
16.9	44.9	7.5	6.8	25,734,000	25,805,000	0.3	50.1	17.4	15.7
−1.6	25.4	12.1	12.5	17,487,000	16,362,000	6.9	89.8	—	—
18.7	−23.1	3.4	2.9	12,789,000	12,466,000	2.5	71.4	10.2	8.7
−11.8	10.5	4.2	4.9	18,205,000	17,994,000	1.2	56.5	—	—
−75.2	−~~82.6~~	0.6	3.1	37,744,000	27,199,000	38.7	64.1	7.3	8.6
11.9	39.9	6.1	5.9	10,202,800	9,228,000	10.6	69.7	12.3	12.6

(d) Net income was approximately 126,000,000 before 4th quarter write-offs.

(e) Owned by United States Steel—figures are for oil and gas segment only.

(f) Net income was $1,071,000,000 before $765,000,000 assets/reserves write-down.

Refinery Crude Runs b/d				Total domestic production as % of total domestic runs		Domestic refined petroleum product sales b/d	
Domestic		Foreign					
1984	1983	1984	1983	1984	1983	1984	1983
368,000	341,000	—	—	18.2%	21.7%	440,000	462,000
112,860	105,310	—	—	16.7	17.3	142,449	136,485
301,813	285,029	—	—	0.8	0.94	374,308	358,900
740,700	697,000	0	0	88.4	93.7	805,100	729,500
1,319,000	845,000	717,000	588,000	44.2	41.8	1,467,000	932,000
—	—	—	—	—	—	—	—
—	82,992	—	11,576	—	4.62	—	113,000
120,000	117,000	—	—	61.1	27.3	143,059	131,062
1,021,000	958,000	2,199,000	2,308,000	76.1	81.5	1,149,000	1,146,000
116,045	119,135	—	—	16.8	21.7	163,732	163,508
—	374,254	—	45,346	—	42.0	466,800	431,146
636,000	618,000	984,000	976,000	61.0	49.2	708,000	699,000
84,204	90,344	13,233	19,893	16.3	16.6	92,071	95,062
288,000	260,000	—	—	47.2	48.8	507,000	505,000
897,000	874,000	0	0	75.8	71.6	903,000	846,000
897,000	933,000	—	—	45.6	43.1	860,000	860,000
405,700	393,700	—	—	100	100	410,813	404,677
325,900	302,700	136,100	145,800	48.7	56.4	582,000	586,400
92,692	83,654	—	—	96.1	92.8	126,235	129,456
946,000	676,000	2,025,000	1,708,000	41.5	58.1	1,180,000	831,000
351,300	380,300	—	—	43.3	40.2	401,900	386,000

Quarterly and Full-Year Earnings—1984 vs. 1983

(Add 000,000)

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Full-Year 1984	Full-Year 1983	% Change
Exxon Corp.	$1,475.0	$1,350.0	$1,275.0	$1,425.0	$5,525.0	$4,978.0	11.0%
Mobil Oil Corp.	380.0	366.0	238.0	286.0	1,270.0	1,503.0	(15.5)
Texaco Inc.	321.0	302.0	235.0	(552.0)	306.0	1,233.0	(75.2)
Standard Oil Co. (Indiana)	594.0	524.0	600.0	465.0	2,183.0	1,868.0	16.9
Standard Oil Co. (California)	378.0	380.0	342.0	434.0	1,534.0	1,590.0	(3.5)
Atlantic Richfield Co.	395.1	406.3	(519.0)	285.0	367.0	1,348.0	(63.4)
Shell Oil Co.	326.0	418.0	447.0	580.8	1,772.0	1,633.0	8.5
Gulf Oil Corp. (a)	220.0	—	—	—	—	—	—
Tenneco Inc.	155.0	220.0	126.0	130.0	631.0	716.0	(11.9)
Standard Oil Co. (Ohio)	381.0	458.0	359.0	290.0	1,488.0	1,512.0	(1.6)
Phillips Petroleum Co.	193.0	231.0	217.0	169.0	810.0	721.0	12.3
Sun Co.	143.0	137.0	122.0	136.0	538.0	453.0	18.8
Getty Oil Co. (b)	—	—	—	—	—	—	—
Union Oil Co. of California	180.1	185.7	181.2	153.4	700.4	625.9	11.9
Amerada-Hess Corp.	88.4	45.5	40.6	(4.9)	170.5	205.3	(17.0)
Ashland, Inc. (c)	5.0	36.2	(240.9)	25.9	(172.5)	102.8	—
Kerr-McGee Corp.	40.3	68.0	21.6	(35.0)	65.0	118.0	(44.9)
Diamond-Shamrock Corp.	59.5	64.3	61.6	56.8	242.2	(56.2)	—
Murphy Oil Corp.	26.3	23.6	25.3	20.9	96.1	127.4	(24.6)
American Petrofina Co.	10.3	15.7	1.8	17.3	45.1	55.3	(18.4)
Southland Corp. (d)	41.2	58.5	59.9	30.7	160.3	131.8	21.6

(a) Gulf Oil was purchased by Chevron in the spring of 1984 and its earnings were not published separately.
(b) Getty was purchased by Texaco in early 1984 and its earnings were rolled into Texaco's report.
(c) Ashland's fiscal ends 9/30 and the full-years of 1984 and 1983 reflect this aspect.
(d) Southland, while not an oil company per se, is nevertheless the leading independent retailer of gasoline.

How They Fared in 1983 vs. 1982

(Add 000,000)

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Full-Year 1983	Full-Year 1982	% Change
Exxon Corp.	$1,060.0	$1,075.0	$1,225.0	$1,630.0	$4,990.0	$4,190.0	19.1%
Mobil Oil Corp.	250.0	402.0	404.0	445.0	1,501.0	1,213.0	23.7
Texaco Inc.	319.0	327.0	331.0	256.0	1,233.0	1,281.0	(3.7)
Standard Oil Co. (Indiana)	399.0	426.0	584.0	459.0	1,868.0	1,826.0	2.3
Standard Oil Co. (California)	310.0	368.0	509.0	403.0	1,590.0	1,380.0	15.2
Atlantic Richfield Co.	310.4	393.4	405.1	419.0	1,547.0	1,676.1	7.6
Shell Oil Co.	246.0	390.0	449.0	549.0	1,633.0	1,605.0	1.7
Gulf Oil Corp.	182.0	223.0	276.0	297.0	978.0	900.0	8.7
Tenneco Inc.	111.0	205.0	159.0	241.0	716.0	819.0	(12.6)
Standard Oil Co. (Ohio)	277.0	476.0	435.0	324.0	1,512.0	1,879.0	(19.5)
Phillips Petroleum Co.	129.0	169.0	176.0	247.0	721.0	646.0	11.6
Sun Co.	90.0	135.0	167.0	61.0	453.0	537.0	(15.6)
Getty Oil Co.	157.8	(86.1)	183.7	238.9	494.3	691.6	(28.5)
Union Oil Co. of California	128.3	139.4	180.2	178.0	626.0	804.0	(22.1)
Amerada-Hess Corp.	5.0	68.2	75.1	57.0	205.3	168.7	21.7
Ashland, Inc.	29.1	(14.5)	37.1	51.1	102.8	180.9	(43.1)
Kerr-McGee Corp.	23.7	37.8	39.7	17.1	118.4	209.8	(43.5)
Diamond-Shamrock Corp.	4.6	29.5	39.7	(130.0)	(56.2)	185.1	—
Murphy Oil Corp.	27.9	40.4	39.8	24.0	132.0	158.0	(16.5)
American Petrofina Co.	0.3	8.6	23.0	55.3	23.4	14.8	58.1
Crown Central Petroleum Corp.	(10.5)	3.9	3.6	7.0	4.0	7.0	(42.6)
Southland Corp.	7.7	34.0	60.1	36.8	138.6	101.2	40.0

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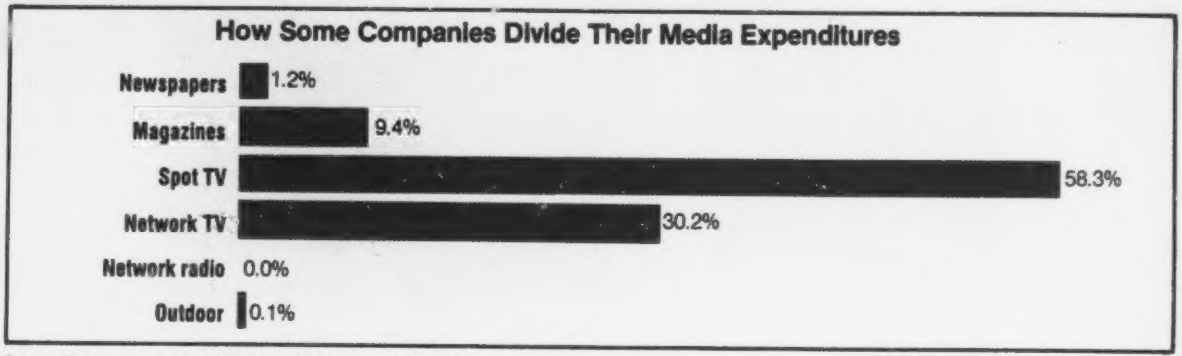
How Oil Spends Its Ad Money


How Some Companies Divide Their Media Expenditures

Source: Various groups. See footnotes of table below for specifics.

Spot TV Spending

Company	1983 Spending (Add 000)	1984 Spending (Add 000)	% Change	Company	1983 Spending (Add 000)	1984 Spending (Add 000)	% Change
Exxon	$15,371	$16,237	+ 6%	Ashland	3,037	3,102	+ 2%
Chevron (incl. Gulf)	10,110	12,433	+ 23	Quaker State	2,624	2,844	+ 8
Standard Oil (Ind.)	11,977	11,546	− 4	Sun	3,300	2,794	− 15
Shell	7,386	10,989	+ 49	Burmah Oil	2,241	2,768	+ 24
Mobil	7,384	9,571	+ 30	Witco (Kendall & Amalie)	487	1,373	+182
Texaco (incl. Getty)	8,707	8,824	+ 1	Amerada Hess	—	936	—
Atlantic Richfield	1,965	4,736	+141	Conoco	225	860	+282
Union Oil Co. of Calif.	6,072	4,671	− 23	Am. Petrofina	1,008	795	− 21
Pennzoil	2,849	4,556	+ 60	Standard Oil (Ohio)	663	615	− 7
Phillips	802	3,669	+357	Marathon Oil	388	447	+ 15

Source: Television Bureau of Advertising from Broadcast Advertisers Reports (BAR) in the top 75 markets, April 1985.

Network TV Spending

Company	1983 Spending (Add 000)	1984 Spending (Add 000)	% Change	Company	1983 Spending (Add 000)	1984 Spending (Add 000)	% Change
Atlantic Richfield	$ 141	$10,020	+7006%	General Motors (Goodwrench Motor Oil)	—	2,525	—%
Phillips	11,225	7,979	− 29	Unocal	1,005	1,909	+ 90
Quaker State	4,587	7,270	+ 58	Shell	1,697	1,643	− 3
Sun	1,933	6,491	+ 236	Witco (Kendall)	1,045	860	− 18
Texaco (inc. Getty)	5,303	5,870	+ 11	Chevron (inc. Gulf)	999	369	− 63
Burmah (Castrol)	3,819	5,348	+ 40	Conoco	631	342	− 46
Pennzoil	5,877	5,006	− 15				

Source: Television Bureau of Advertising from Broadcast Advertisers Reports (BAR) in the top 75 markets, April 1985.

How Some Oil Companies Split Their Budgets

(Add 000)

	Mobil		Exxon		Arco		Phillips	
	1984	1983	1984	1983	1984	1983	1984	1983
Newspaper Supplements	$ 1,128	$ 1,306	$ 53	—	—	—	NA	$ 6
Magazines (a)	3,799	3,924	4,804	3,321	534	339	NA	1,450
Spot TV	26,377	20,825	16,239	16,210	10,438	7,114	3,669	802
Network TV	11,321	7,170	—	1,110	10,020	82	7,979	11,224
Network Radio	—	—	—	580	—	—	NA	892
Outdoor	44	53	839	350	1	4	NA	8
Totals	**$42,669**	**$33,278**	**$21,935**	**$21,571**	**$20,993**	**$7,539**	**$11,648**	**$14,382**

(a) Includes general, business and farm publications.
NA = Not available.
Sources: Leading National Advertisers, Publishers' Information Bureau, Broadcaster-Advertiser Reports Inc., Television Bureau of Advertising, and Institute of Outdoor Advertising.

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NAME
COMPANY
TYPE OF BUSINESS
ADDRESS
CITY/STATE/ZIP
TELEPHONE

ADVANCED DIGITAL DATA

Current Automotive Registrations

	Automobiles			Trucks and Buses			All Motor Vehicles			Motorcycles
State	Registered 1983	Estimated 1984	% Chng.	Registered 1983	Estimated 1984	% Chng.	Registered 1983	Estimated 1984	% Chng.	Estimated 1984
Alabama	2,271,950	2,317,000	2.0	872,819	893,000	2.3	3,144,769	3,210,000	2.1	76,000
Alaska	218,673	234,000	7.0	131,815	144,000	9.2	350,488	378,000	7.8	11,000
Arizona	1,634,258	1,682,000	2.9	655,218	675,000	3.0	2,289,476	2,357,000	2.9	89,000
Arkansas	941,393	927,000	−1.5	504,078	501,000	−0.6	1,445,471	1,428,000	−1.2	23,000
California	13,935,390	14,730,000	5.7	3,831,369	4,140,000	8.1	17,766,759	18,870,000	6.2	715,000
Colorado	1,939,178	2,020,000	4.2	709,690	759,000	6.9	2,648,868	2,779,000	4.9	117,000
Connecticut	2,149,351	2,185,000	1.7	155,751	155,000	−0.5	2,305,102	2,340,000	1.5	80,000
Delaware	342,205	361,000	5.5	84,598	92,000	8.7	426,803	453,000	6.1	11,000
Dist. of Col.	214,299	215,000	0.3	18,426	19,000	3.1	232,725	234,000	0.5	6,000
Florida	7,113,942	7,682,000	8.0	1,694,544	1,866,000	10.1	8,808,485	9,548,000	8.4	247,000
Georgia	3,132,514	3,202,000	2.2	1,075,194	1,096,000	1.9	4,207,708	4,298,000	2.1	107,000
Hawaii	557,879	573,000	2.7	58,536	60,000	2.5	616,415	633,000	2.7	9,000
Idaho	529,018	530,000	0.2	348,302	359,000	3.1	877,320	889,000	1.3	51,000
Illinois	5,929,783	6,002,000	1.2	1,583,335	1,705,000	7.7	7,513,118	7,707,000	2.6	231,000
Indiana	2,852,382	2,850,000	−0.1	999,370	994,000	−0.5	3,851,752	3,844,000	−0.2	136,000
Iowa	1,764,651	1,780,000	0.9	714,467	751,000	5.1	2,479,118	2,531,000	2.1	242,000
Kansas	1,408,358	1,423,000	1.0	639,173	649,000	1.5	2,047,531	2,072,000	1.2	102,000
Kentucky	1,812,875	1,816,000	0.2	807,949	816,000	1.0	2,620,824	2,632,000	0.4	58,000
Louisiana	2,023,957	2,037,000	0.6	852,664	872,000	2.3	2,876,621	2,909,000	1.1	63,000
Maine	561,947	583,000	3.7	203,834	207,000	1.6	765,781	790,000	3.2	50,000
Maryland	2,516,084	2,675,000	6.3	495,025	517,000	4.4	3,011,109	3,192,000	6.0	71,000
Massachusetts	3,374,962	3,401,000	0.8	464,745	467,000	0.5	3,839,707	3,868,000	0.7	116,000
Michigan	5,024,521	5,038,000	0.3	1,270,328	1,291,000	1.6	6,294,849	6,329,000	0.5	229,000
Minnesota	2,407,373	2,448,000	1.7	874,784	915,000	4.6	3,282,157	3,363,000	2.5	171,000
Mississippi	1,189,446	1,192,000	0.2	370,831	373,000	0.6	1,560,277	1,565,000	0.3	29,000
Missouri	2,541,403	2,553,000	0.5	891,639	907,000	1.7	3,433,042	3,460,000	0.8	91,000
Montana	486,294	526,000	8.2	342,443	368,000	7.5	828,737	894,000	7.9	32,000
Nebraska	815,232	828,000	1.6	419,359	427,000	1.8	1,234,591	1,255,000	1.7	47,000
Nevada	527,232	542,000	2.8	203,219	213,000	4.8	730,451	755,000	3.4	22,000
New Hampshire	686,966	712,000	3.6	115,674	118,000	2.0	802,640	830,000	3.4	55,000
New Jersey	4,412,437	4,438,000	0.6	528,237	535,000	1.3	4,940,674	4,973,000	0.7	99,000
New Mexico	798,398	819,000	2.6	438,144	462,000	5.4	1,236,542	1,281,000	3.6	55,000
New York	7,357,044	7,585,000	3.1	1,059,459	1,087,000	2.6	8,416,503	8,672,000	3.0	210,000
North Carolina	3,461,818	3,543,000	2.3	1,141,563	1,147,000	0.5	4,603,381	4,690,000	1.9	116,000
North Dakota	390,331	396,000	1.5	275,360	280,000	1.7	665,691	676,000	1.5	33,000
Ohio	6,429,344	6,520,000	1.4	1,339,001	1,349,000	0.7	7,768,345	7,869,000	1.3	289,000
Oklahoma	1,757,739	1,745,000	−0.7	1,011,319	1,030,000	1.8	2,769,058	2,775,000	0.2	129,000
Oregon	1,476,548	1,486,000	0.6	643,975	667,000	3.6	2,120,523	2,153,000	1.5	85,000
Pennsylvania	5,738,155	5,868,000	2.3	1,105,894	1,110,000	0.4	6,844,049	6,978,000	2.0	229,000
Rhode Island	518,803	524,000	1.0	79,535	81,000	1.8	598,338	605,000	1.1	27,000
South Carolina	1,578,316	1,646,000	4.3	479,479	502,000	4.7	2,057,795	2,148,000	4.4	40,000
South Dakota	390,543	399,000	2.2	238,915	242,000	1.3	629,458	641,000	1.8	40,000
Tennessee	2,904,367	2,999,000	3.3	632,645	650,000	2.7	3,537,012	3,649,000	3.2	79,000
Texas	8,159,008	8,328,000	2.1	3,536,470	3,713,000	5.0	11,695,478	12,041,000	3.0	324,000
Utah	735,930	769,000	4.5	338,354	350,000	3.4	1,074,284	1,119,000	4.2	68,000
Vermont	282,469	298,000	5.5	84,886	88,000	3.7	367,355	386,000	5.1	23,000
Virginia	3,328,903	3,405,000	2.3	565,157	580,000	2.6	3,894,060	3,985,000	2.3	81,000
Washington	2,360,117	2,407,000	2.0	978,216	994,000	1.6	3,338,333	3,401,000	1.9	134,000
West Virginia	906,519	925,000	2.0	388,646	401,000	3.2	1,295,165	1,326,000	2.4	31,000
Wisconsin	2,547,140	2,597,000	2.0	667,022	717,000	7.5	3,214,162	3,314,000	3.1	215,000
Wyoming	290,428	292,000	0.5	211,840	220,000	3.9	502,268	512,000	1.9	24,000
TOTAL	**126,727,873**	**130,053,000**	**2.6**	**37,133,296**	**38,554,000**	**3.8**	**163,861,169**	**168,607,000**	**2.9**	**5,618,000**

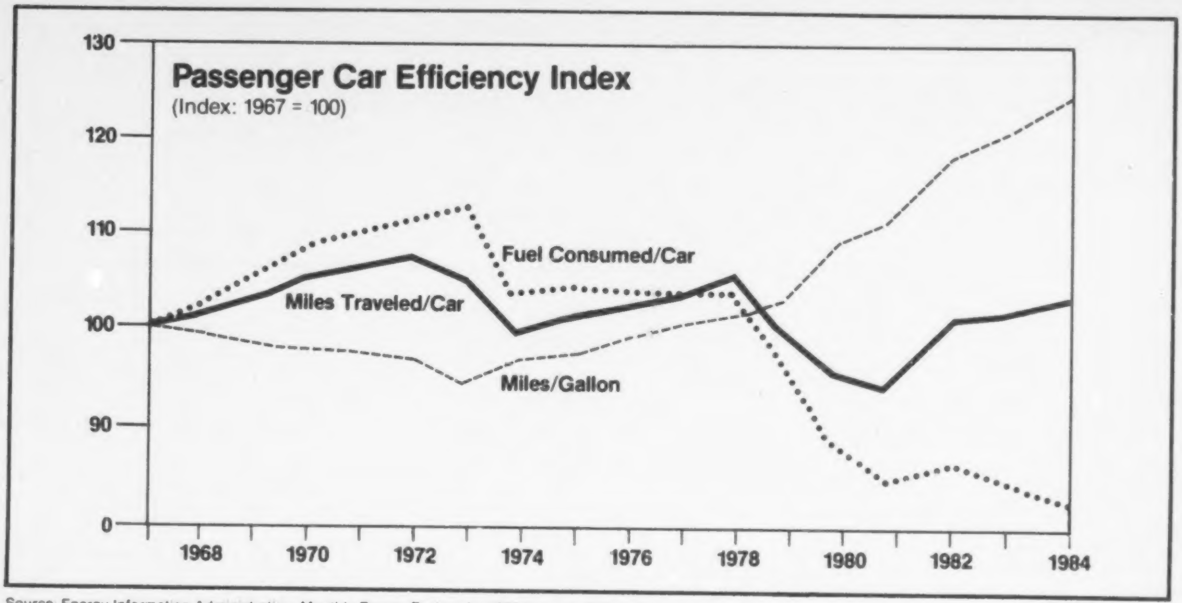
Source: Federal Highway Administration, SS83-2, October 1984.

Estimated Licensed Drivers, By Sex and States, 1983 and 1984

(Add 000)

	1983 (Actual)				1984 (Estimated)		
State	**Male**	**Female**	**Total**	**% Male Drivers**	**Male**	**Female**	**Total**
Alabama	1,244	1,150	2,394	51.98	1,270	1,174	2,444
Alaska	168	121	289	58.12	164	119	283
Arizona	1,178	1,001	2,179	54.06	1,249	1,062	2,311
Arkansas	852	798	1,650	51.63	884	829	1,713
California	8,810	7,838	16,649	52.92	8,994	8,001	16,995
Colorado	1,162	1,067	2,229	52.15	1,188	1,090	2,278
Connecticut	1,163	1,086	2,250	51.71	1,189	1,111	2,300
Delaware	222	210	432	51.42	225	213	438
Dist. of Col.	203	167	370	54.96	206	168	374
Florida	4,334	4,014	8,347	51.92	4,498	4,166	8,664
Georgia	1,917	1,808	3,725	51.45	1,974	1,862	3,836
Hawaii	318	257	575	55.26	323	261	584
Idaho	339	309	648	52.26	345	316	661
Illinois	3,649	3,336	6,985	52.24	3,663	3,349	7,012
Indiana	1,818	1,732	3,551	51.21	1,822	1,736	3,558
Iowa	958	971	1,929	49.65	949	963	1,912
Kansas	851	830	1,681	50.61	842	822	1,664
Kentucky	1,173	1,019	2,193	53.52	1,193	1,037	2,230
Louisiana	1,462	1,305	2,767	52.84	1,523	1,360	2,883
Maine	396	374	770	51.40	405	383	788
Maryland	1,450	1,350	2,799	51.78	1,477	1,375	2,852
Massachusetts	1,907	1,771	3,678	51.85	1,902	1,766	3,668
Michigan	3,312	3,033	6,345	52.20	3,335	3,053	6,388
Minnesota	1,232	1,141	2,374	51.92	1,247	1,155	2,402
Mississippi	966	837	1,803	53.57	991	859	1,850
Missouri	1,715	1,608	3,323	51.60	1,732	1,624	3,356
Montana	268	221	489	54.82	271	223	494
Nebraska	564	530	1,095	51.55	568	534	1,102
Nevada	359	317	676	53.09	376	333	709
New Hampshire	362	335	697	51.89	371	344	715
New Jersey	2,876	2,583	5,459	52.68	2,985	2,681	5,666
New Mexico	398	367	766	52.00	410	379	789
New York	5,114	4,491	9,606	53.24	5,169	4,540	9,709
North Carolina	2,040	1,926	3,966	51.44	2,080	1,963	4,043
North Dakota	225	207	432	52.06	228	210	438
Ohio	3,839	3,558	7,397	51.90	3,786	3,508	7,294
Oklahoma	1,119	1,055	2,174	51.47	1,152	1,087	2,239
Oregon	1,005	896	1,901	52.83	1,032	919	1,951
Pennsylvania	3,969	3,474	7,443	53.33	4,012	3,511	7,523
Rhode Island	309	294	603	51.23	311	296	607
South Carolina	992	1,016	2,008	49.39	1,012	1,037	2,049
South Dakota	250	232	482	51.82	251	233	484
Tennessee	1,514	1,419	2,933	51.63	1,541	1,443	2,984
Texas	6,021	5,386	11,406	52.78	6,356	5,688	12,044
Utah	460	467	926	49.63	476	484	960
Vermont	190	171	361	52.63	193	175	368
Virginia	2,017	1,687	3,704	54.46	2,069	1,731	3,800
Washington	1,504	1,363	2,867	52.45	1,547	1,403	2,950
West Virginia	795	622	1,417	56.14	790	618	1,408
Wisconsin	1,602	1,484	3,086	51.91	1,622	1,502	3,124
Wyoming	216	178	394	54.77	225	186	411
Total	**80,807**	**73,414**	**154,221**	**52.40**	**82,423**	**74,882**	**157,305**
Percent Change From Prior Year	**2.8**	**2.4**	**2.6**	—	**2.0**	**2.0**	**2.0**

Source: Federal Highway Administration, SS83-5.



Source: Energy Information Administration, Monthly Energy Review, for 1967 through 1983; *NPN* estimates and projections for 1984.

Passenger Car Energy Indicators—1967-1984

(1967 = 100)

	Passenger Cars Only						Passenger Cars (a)		
	Avg. Fuel Used per Car		Avg. Miles Traveled per Car		Avg. Miles per gal. of Fuel				
Year	Gal.	Index	Miles	Index	Miles	Index	Number Registered (000)	Gasoline Consumed (000,000 gal.)	Miles Traveled (000,000)
1984 (b)	570	83.3	9,900	103.9	17.36	124.6	135,671	77,332	1,343,143
1983	577	84.4	9,641	101.2	16.70	119.9	132,313	73,390	1,233,846
1982	587	85.8	9,533	100.1	16.25	116.7	129,500	72,848	1,191,623
1981	579	84.6	9,002	94.4	15.54	111.6	129,123	71,718	1,124,843
1980	603	88.2	9,135	95.8	15.15	108.8	127,448	73,375	1,129,887
1979	664	97.1	9,485	99.5	14.29	102.6	125,750	80,233	1,162,528
1978	715	104.5	10,046	105.4	14.06	100.9	121,717	83,775	1,194,287
1977	706	103.2	9,839	103.2	13.94	100.1	118,711	80,677	1,141,166
1976	711	103.9	9,763	102.4	13.72	98.5	115,170	78,847	1,098,147
1975	712	104.1	9,634	101.1	13.53	97.1	111,679	76,457	1,050,472
1974	704	102.9	9,448	99.1	13.43	96.4	109,823	74,217	1,013,068
1973	763	111.5	9,992	104.8	13.10	94.0	106,119	78,011	1,036,455
1972	755	110.4	10,184	106.9	13.49	96.8	100,658	73,463	1,003,498
1971	746	109.1	10,121	106.2	13.57	97.4	96,144	69,514	954,155
1970	735	107.5	9,978	104.7	13.57	97.4	92,095	65,784	900,992
1967	684	100.0	9,531	100.0	13.93	100.0	82,367	55,110	774,203

(a) These totals include motorcycles.

(b) Estimates by *NPN* based on Federal Highway Administration preliminary data.

Source: Energy Information Administration Monthly Energy Review; Federal Hignway Administration, Table SS83-15 (VM-1); American Petroleum Institute Basic Data Book, January 1985.

Mileage and Consumption Data—1983

	Passenger Vehicles						
		Buses					
	Cars and Motorcycles	Commercial	School	All Buses	Total Passenger	Trucks and Combinations	All Motor Vehicles
Fuel consumed (million gal.)	73,390(a)	737	402	1,139	74,530	40,858	115,388
Average per vehicle (gal.)	555(b)	6.625	848	1,946	561	1,118	681
Average miles per gal.	16.81(c)	4.95	7.70	5.92	16.65	10.00	14.29
Vehicles registered (thousands)	132,313(d)	111	474	586	132,898	36,548	169,446
Average miles traveled	9,325(e)	32,795	6,532	11,521	9,335	11,178	9,732
Average miles traveled (millions):							
Main rural roads	289,514	792	801	1,593	291,107	127,009	417,116
Local rural roads	187,728	461	1,022	1,483	189,211	93,206	282,417
Urban streets	756,604	2,401	1,269	3,670	760,274	188,299	948,573
Total travel in 1983	**1,233,846(f)**	**3,648**	**3,098**	**6,746**	**1,240,592**	**408,514**	**1,649,106**
Total travel in 1982	**1,191,623**	**3,577**	**3,062**	**6,639**	**1,198,262**	**394,219**	**1,592,481**

(a) Includes 73,150,198,000 for passengur cars and 240,000,000 for motorcycles.

(b) Includes 577 for passenger cars and 43 for motorcycles.

(c) Includes 16.25 mpg for passenger cars and 50.00 mpg for motorcycles.

(d) Includes 126,727,870,000 passenger cars and 5,585,112 motorcycles.

(e) Includes 1,221,846,000 for passenger cars and 12,000,000 for motorcycles.

(f) Includes 1,179,000,000,000 for passenger cars and 12,000,000 for motorcycles.

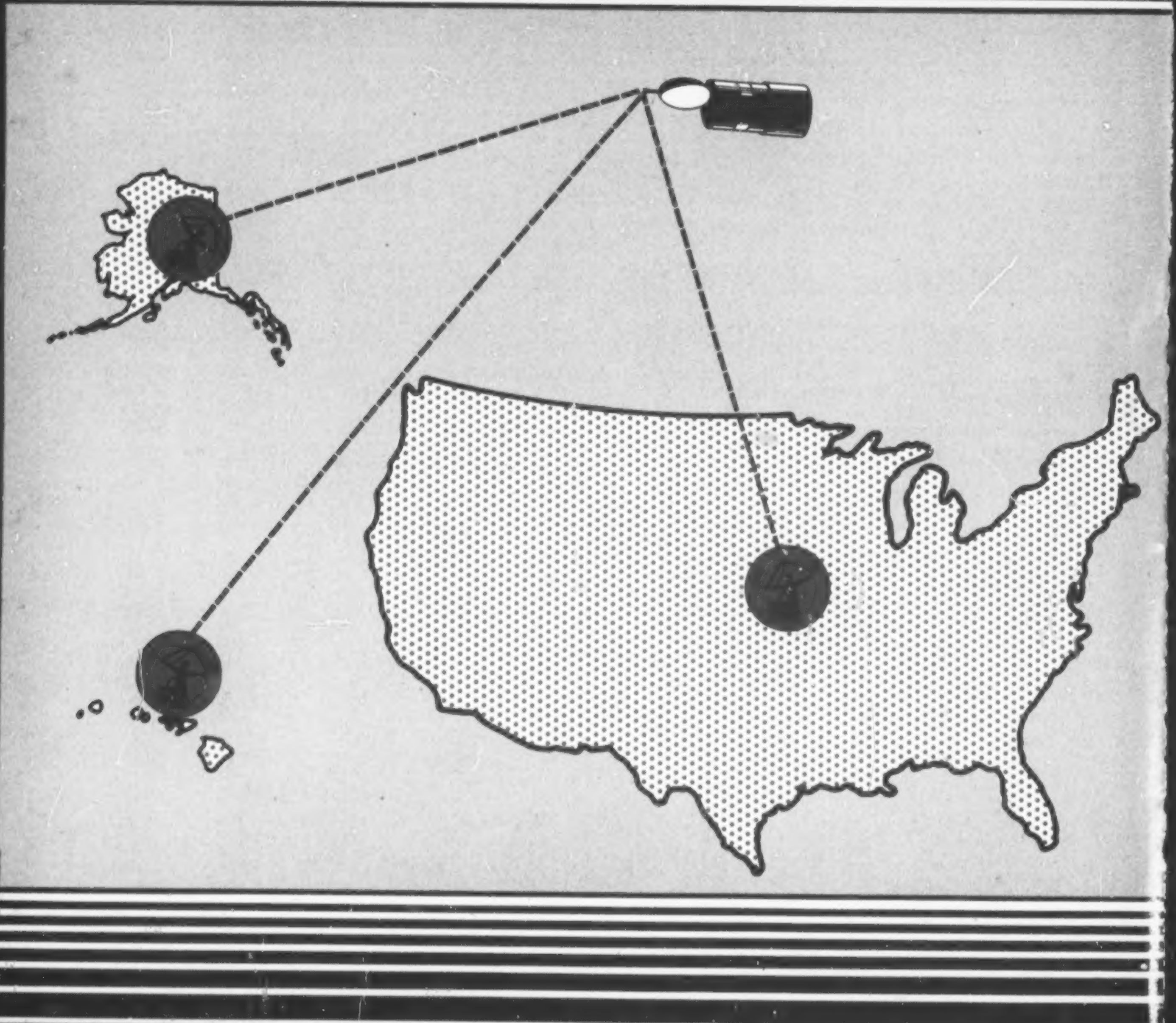
Source: Federal Highway Administration, Table SS83-15 VM-11, October 1984.

1983 Relationships by Population and Drivers

State	Resident Population (1,000)	Licensed Drivers per 1,000 Resident Population	Registered Motor Vehicles per 1,000 Resident Population	Gal. of Fuel per Vehicle	Miles per Gal.	Annual Miles per Vehicle	Vehicle Miles per Licensed Driver
Alabama	3,959	605	794	679	14.52	9,868	12.963
Alaska	479	603	732	797	12.02	9,581	11.630
Arizona	2,963	735	773	691	12.39	8,566	9,001
Arkansas	2,328	709	621	935	12.34	11,542	10,114
California	25,174	661	706	674	15.24	10,281	10,971
Colorado	3,139	710	844	599	15.19	9,102	10,816
Connecticut	3,138	717	735	611	14.65	8,950	9,171
Delaware	606	713	704	813	14.08	11,448	11,309
Dist. of Col.	623	594	374	806	16.52	13,316	8,371
Florida	10,680	782	825	630	14.74	9,284	9,797
Georgia	5,732	650	734	814	14.25	11,607	13,110
Hawaii	1,023	562	603	515	18.49	9,528	10,214
Idaho	989	655	887	560	16.88	9,446	12,786
Illinois	11,486	608	654	665	13.49	8,967	9,645
Indiana	5,479	648	703	777	13.31	10,343	11,219
Iowa	2,905	664	853	650	12.21	7,931	10,193
Kansas	2,425	693	844	687	12.91	8,866	10,798
Kentucky	3,714	890	706	762	13.38	10,195	12,186
Louisiana	4,438	624	848	847	11.32	9,585	9,964
Maine	1,146	672	668	762	13.58	10,348	10,288
Maryland	4,304	650	700	691	14.72	10,168	10,937
Massachusetts	5,767	638	666	633	15.44	9,777	10,205
Michigan	9,069	700	694	537	17.99	9,667	9,592
Minnesota	4,144	573	792	653	14.50	9,464	13,085
Mississippi	2,587	697	603	874	13.06	11,410	9,874
Missouri	4,970	669	691	823	12.94	10,644	10,999
Montana	817	598	1,014	632	13.70	8,665	14,697
Nebraska	1,597	665	773	727	12.84	9,342	10,536
Nevada	891	759	820	751	12.52	9,408	10,165
New Hampshire	959	727	837	534	16.76	8,947	10,303
New Jersey	7,468	731	662	738	14.33	10,569	9,567
New Mexico	1,399	547	884	703	13.43	9,444	15,255
New York	17,667	544	476	673	14.80	9,955	8,722
North Carolina	6,082	652	757	707	13.84	9,784	11,355
North Dakota	680	635	979	626	12.86	8,056	12,422
Ohio	10,746	688	723	670	14.07	9,425	9,897
Oklahoma	3,298	659	840	776	13.76	10,677	13,597
Oregon	2,662	714	797	673	14.41	9,694	10,816
Pennsylvania	11,895	626	575	729	14.49	10,564	9,714
Rhode Island	955	632	627	624	16.10	10,051	9,971
South Carolina	3,264	615	630	856	14.18	12,138	12,441
South Dakota	700	689	899	656	15.31	10,036	13,094
Tennessee	4,685	626	755	765	13.40	10,252	12,362
Texas	15,724	725	744	824	13.69	11,276	11,562
Utah	1,619	572	664	723	14.45	10,445	12,112
Vermont	525	687	700	710	15.92	11,300	11,510
Virginia	5,550	667	702	741	14.66	10,862	11,419
Washington	4,300	667	776	634	17.08	10,827	12,607
West Virginia	1,965	721	659	691	13.07	9,031	8,254
Wisconsin	4,751	649	677	697	15.23	10,611	11,053
Wyoming	514	767	977	834	12.07	10,072	12,639
Total	**233,981**	**659**	**700**	**704**	**14.29**	**10,064**	**10,693**

Source: Federal Highway Administration, Table SS83-17, October 1984.

THE ELECTRONIC RETAIL SUPPORT SYSTEMS NETWORK

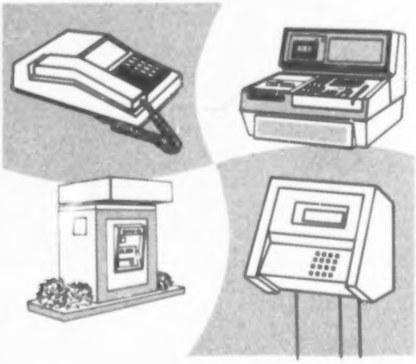


THE NETWORK FOR TODAY
AND FOR THE FUTURE

JCPenney is one of the largest retailers in the world.

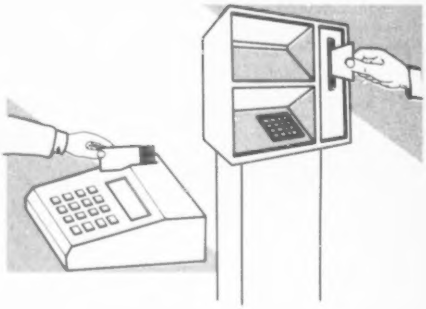
Our basic business is the same as yours—selling goods and services to the consumer. Over the past ten years JCPenney has developed a nationwide communications network with over 35,000 on-line terminals supporting our retail management systems.

JCPenney Systems Services, a wholly owned subsidiary, is a full service vendor offering your company access to the JCPenney network and retail systems expertise. This allows you to implement solutions to your business problems immediately—without the customary development time and costs. We now are the largest provider of Data Capture Services to the Petroleum Industry.



The JCPenney network has the ability to interface with many types of equipment: dial-up terminals, electronic cash registers, island card readers — whatever type of equipment you select, JCPenney will accommodate your needs.

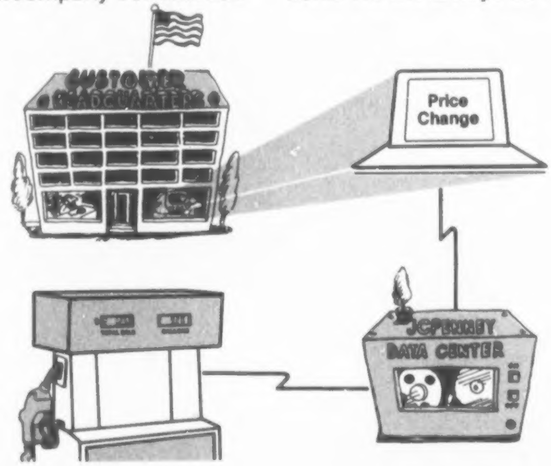
The JCPenney offering includes: authorization of proprietary credit cards, bank credit cards or debit cards; data collection; transaction logging; reconciliation; and delivery of data to the designated settlement system or data center. The offering is flexible and modular — allowing you to incorporate additional applications and additional locations if and when you need them. System redundancy, a complete help desk service and a sophisticated technical staff provide the ability for JCPenney Systems Services to deliver a network service of proven reliability.



The basic service consists of a terminal installed at a customer location connected to a computer in a nearby JCPenney store via a leased line or dial-up link. Using a nearby JCPenney store as the network entry point makes the communication link the shortest and least expensive possible — providing the most cost effective electronic authorization and settlement services for you, the customer.

The benefits of the JCPenney approach to the Petroleum retailer are: reduction in float, reduction in bad debt, reduction in labor costs, improved customer service and convenience, increased market share, more marketing flexibility, improved intercompany communications — and it prepares you for the electronic payments system of the future.

Systems Services has positioned itself to be able to move rapidly into new technologies and new applications. We will always be ready with the right network and information processing systems to serve our petroleum customers' needs. Turning today's ideas into tomorrow's products is JCPenney Systems Services commitment to its present and future customers.



For further information contact:

JCPenney Systems Services, Inc.

1301 Avenue of the Americas • New York, NY 10019 • (212) 957-6211

Brand Names of Gasoline and Motor Oil

	Gasoline	Motor Oil
Ada Resources	Phillips 66 (r,ur,up,d)	Phillips 66
American Petrofina	Fina (r,ur,up)	Fina Shield
		Fina HD Premium
		Fina Ultra Supreme
		Fina Turbo
		Fina 2001
Amoco Oil Co.	Amoco (r)	Amoco 100
	Amoco Lead Free (ur)	Amoco 200
	Amoco Premium Lead Free (up)	Amoco 300
		Amoco M-V
		Amoco LDO
		Amoco Ultimate
Arkansas Valley Petroleum	DX (r,ur,up)	
	Phillips 66 (r,ur,up)	
	Fina (r,ur,up)	
Ashland Oil Inc.	Ashland (r,ur,up)	SuperAmerica
	SuperAmerica (r,ur,up,sp,usp,d)	Valvoline
	Payless (r,ur,up,sp,usp,d)	
	Hi-Fy (r,ur,up,sp,usp,d)	
	Bi-Lo (r,ur,up,sp,usp,d)	
	Save More (r,ur,up,sp,usp,d)	
	SoLo (r,ur,up,sp,usp,d)	
	Red Head (r,ur,up,sp,usp,d)	
Atlantic Richfield Co.	ARCO (r)	ARCO
	ARCO Clear Unleaded (ur)	ARCO Fleet HD
	ARCO Unleaded Supreme (up)	ARCO XHD
	ARCO Lowlead (r—Chicago only)	ARCO Fleet S3 Plus
		ARCO Supreme
		ARCO GT
		ARCO Graphite
Bagwell Oil Co.	Union 76 (r,ur,up,d)	Union 76
		Wolf's Head
E.M. Bailey Distributing Co.	Chevron (r,ur,up,d)	Chevron
	Pettro (r,ur,sp,d)	Quaker State
Beacon Oil Co.	Beacon (r,ur,p,up,d)	Sequoia
	Ultra (r,ur,p,d)	Beacon
	Gas-N-Go (r,ur,p,d)	
Best Oil Co.	Gulf	
	Mobil	
	Amoco	
Bray Terminals Inc.	Citgo (r,ur,up)	Citgo
	Gas Up Shoppe (r,ur,up,d,o)	Arco
Brennan Petroleum Co.	Brenco (r,ur,up,d)	
Browning Oil Co.	Shell (r,ur,up)	Shell
	Rally (r,ur,up)	
California Target Enterprises Inc.	Fast Save (r,ur,p,up,d)	
	Q Brand (r,ur,p,up,d)	
	Texaco (r,ur,up)	
	Buy-Rite (r,ur,p,d)	
Campbell Oil Co.	Sunoco	Citgo
	Shell	Sunoco
	Union 76	Shell
Cel Oil Products Corp.	Cel (r,ur,p,up,d)	
	Gas-Up (r,ur,p,up,d)	
Cenex	Cenex (r,ur,up,d)	Econex
		Cenex
		Superlube 518
Certified Oil Co.	Certified (r,ur)	Certified
		Quaker State
		Valvoline
Charter Marketing Co.	Charter (r,ur,up)	
	Old Colony (r,ur,up)	
	A-1 (r,ur,up)	
Chevron Corp.	Chevron Regular (r)	Chevron Delo 100
	Chevron Unleaded (ur)	Chevron Delo 200
	Chevron Supreme Unleaded (up)	Chevron RPM Delo Motor Oil
	Chevron Unleaded w/Ethanol (o)	Chevron Special
	Calco Regular (r)	Chevron Delo 300
	Calco Unleaded (ur)	Chevron Delo 400
	Calco Premium Unleaded (up)	Chevron Custom
	Calco Unleaded w/Ethanol (o)	Chevron Delo 300 15W-40
Circle K Corp.	Aero K (r,ur,up)	
Citgo Petroleum Corp.	Citgo Regular (r)	Citgo Non-detergent Motor Oils
	Citgo Unleaded (ur)	Citgo C-300 Detergent Motor Oils
	Citgo Unleaded Plus 2 (up)	Citgo All Season Motor Oils
	Citgo Super Unleaded (usp)	Citgo C-500 Motor Oils
		Citgo C-500 PLUS Motor Oils
		Citgo 93414 Motor Oils
Coast Oil Co.	Texaco (r,ur,up,d)	Morlube
	Arco (r,ur,up,d)	Coast
	Rotten Robbie (r,ur,p,up,d)	
Coen Oil Co.	Amoco	
	Mobil	
	Lawsons	
Colonial Oil Industries	Eagle (r)	
	Colonial No-Lead (ur)	
	Colonial No-Lead (up)	
	Colonial Diesel (d)	
Comet Oil Co.	Comet	
Cook & Cooley Inc.	Texaco (r,ur,up)	
Consumers Oil Corp.	Mobil	Mobil
	Chevron	
Crown Central Petroleum Corp.	Crown (r)	All Season HD
	Lead-Free (ur)	Premium HD
	Lead-Free Xtra (up)	Quality
	Diesel (d)	
Crystal Flash Petroleum Corp.	Crystal (r,ur)	
Crystal Petroleum Co.	Shell (r,ur,up,d)	
	Champlin (r,ur,up,d)	
Crystal U.S.A. Oil Inc.	Crystal (r,ur,p,d)	Saxon
Dairy Mart Inc.	Chevron	Chevron
	Gulf	Quaker State
	A-1	Citgo
DeBlois Oil Co.	Texaco (r,ur,up)	Texaco
	Sunoco (r,ur,up)	Sunoco
Desert Oil Co.	Chevron	
Diamond Shamrock Refining & Marketing Co.	Trail Master (r)	Liberty
	Cloud Master (ur)	Genuine
	Premium (up)	LPG-NG
	Power Master (d)	Triple Action
		Triple Action S-3
		Equa Flow
Dickey Inc.	Conoco	
	Texaco	
Drake's Refining Stations	Drake's	Kendall
East Coast Oil Corp.	East Coast (r,ur,up,d)	
Englefield Oil Co.	Duke (r,ur,up)	Duke
	Gulf (r,ur,up)	Gulf
	Marathon (r,ur,up)	Marathon
	Mobil (r,ur,up)	Mobil
	Phillips 66 (r,ur,up)	
Exxon Co., U.S.A.	Exxon (r)	Oilex
	Exxon Unleaded (ur)	Exxon Plus
	Exxon Extra (up)	Exxon Extra
	Alert (r,ur,up)	Uniflo
FCX, Inc.	FCX (r,ur,up,d)	Unico
	Unico (r,ur,up,d)	
Flying J Inc.	Flying J (r,ur,up,d)	Flying J
	Husky (r,ur,up,d)	
Fortmeyer's Inc.	Pennzoil	Citgo
	Citgo	Pennzoil
		Amalie
		Arco
Foster Oil Co.	Union 76 (r,ur,d)	Pennzoil
		Union 76
		National
Franko Oil Co.	Franko (r,ur,p,sp)	
GAS-N-Go Inc.	Gas-N-Go (r,ur,up)	

Gasco Gasoline Inc.

Gasoline	Motor Oil
Gasco (r,ur,usp,o)	Economy
	Gasco Premium
	Gasco All Season

Gem Petroleum

Gasoline	Motor Oil
Shop & Go (r,ur,sp,d)	Shop & Go
Gem (r,ur,sp,d)	Citgo
	Quaker State

Golden Gate Petroleum Co.

Gasoline	Motor Oil
Bapco (r,ur,up,d)	Holdener Lubricants

Gresham Petroleum Co.

Gasoline	Motor Oil
Amoco (r,ur,up,d)	Amoco

Gull Industries Inc.

Gasoline	Motor Oil
Gull (r,ur,up)	

Guttman Oil Co.

Gasoline	Motor Oil
Texaco	
Mobil	
Union 76	
Citgo	

Handy Pantry Food Stores (Acme Retail Inc.)

Gasoline	Motor Oil
Shell	
Amoco	
Citgo	
Texaco	
Cavalier	
World	

Hawaiian Independent Refinery Inc.

Gasoline	Motor Oil
Gas Express (r,ur,p,up)	

Highland Petroleum Inc.

Gasoline	Motor Oil
Gas Pit (r,ur)	
7-11 (r,ur)	

Angus I. Hines Inc.

Gasoline	Motor Oil
Shell (r,ur,up,d)	Shell
Texaco (r,ur,up,d)	Texaco
Sentry (r,ur,up,d)	
Serco (r,ur,up,d)	

Hinkle Enterprises Inc.

Gasoline	Motor Oil
Chevron (r,ur,up,d)	Chevron

Barney Holland Oil Co.

Gasoline	Motor Oil
Texaco (r,ur,p,d)	Cook's
	Shell
	RPM Delo
	Havoline
	Pennzoil
	Quaker State

Holland Oil Co.

Gasoline	Motor Oil
Holland Oil (r,ur,up,d)	Valvoline
	Citgo
	Mobil
	Shell

Horkey Oil Co. Inc.

Gasoline	Motor Oil
Shell (r,ur,p,d)	Shell

Huck's Convenience Stores

Gasoline	Motor Oil
Huck's (r,ur,up,d)	Huck's

Hughes Oil Co.

Gasoline	Motor Oil
Mobil (r,ur,up)	Mobil
Phillips 66 (r,ur,up)	Phillips 66

Hull Oil Co.

Gasoline	Motor Oil
Phillips 66 (r,ur,up,d)	Phillips 66
Hull (r,ur,up,d)	

Hunt Oil Co.

Gasoline	Motor Oil
Parade (r,ur,up,d)	

Huntley Jiffy Inc.

Gasoline	Motor Oil
Shell	Jiffy
Phillips 66	Phillips 66
Mobil	Shell
Fina	Quaker State

Independent Stations Co.

Gasoline	Motor Oil
Arco (r,ur,p)	Arco
Exxon (r,ur,p)	Union 76

Jacobus Co.

Gasoline	Motor Oil
Citgo	
Union 76	

J&L Oil Inc.

Gasoline	Motor Oil
J&L (r,ur,p,d)	J&L

Johnson Products Inc.

Gasoline	Motor Oil
Citgo (r,ur,up)	Citgo
Getty (ur,up)	Havoline
Texaco (r,ur,up)	Getty
Mobil (r,ur,up)	
Top Gas (r,ur,up)	

J.S.&J. Service Inc.

Gasoline	Motor Oil
Jimmy's (r,ur,up,d)	
Texaco (r,ur,up,d)	

Kaibab Petroleum Co.

Gasoline	Motor Oil
Whiting	Hy-Grade
	Rev

Kelley-Williamson Co.

Gasoline	Motor Oil
Mobil (r,ur,p,d)	Mobil
	Kendall

Kerr-McGee Refining Corp.

Gasoline	Motor Oil
KM Regular (r)	ValuLube
KM Unleaded Regular (ur)	Blue Max "All Fleet"
KM Unleaded Premium (up)	Heavy Duty
	Blue Velvet FEO

Key Energy Enterprises Inc.

Gasoline	Motor Oil
Union 76 (ur,p,up,usp,d)	Shell
Shell (ur,p,up,usp,d)	Quaker State
	Union 76

Kickapoo Oil Co.

Gasoline	Motor Oil
Kickapoo (r,ur,p,up,d)	Kickapoo
	Pennzoil

Kimber Petroleum Corp.

Gasoline	Motor Oil
Amoco	Amoco
Citgo	Citgo
Getty	Getty

Kimbro Oil Co.

Gasoline	Motor Oil
Amoco (r,ur,up,d)	Amoco
	Quaker State

Kingston Oil Supply Corp.

Gasoline	Motor Oil
Chevron (r,ur,up)	Chevron
Mobil (r,ur,up)	Mobil
Exxon (d)	

Kittle Petroleum Inc.

Gasoline	Motor Oil
Phillips 66	
Texaco	

Kwik Shop Inc.

Gasoline	Motor Oil
Kwik Power (r,ur,up,d)	National
	Ram-A-Lube
	Pennzoil

Land O' Lakes Inc.

Gasoline	Motor Oil
Land O' Lakes (r,ur,d)	Supreme 212
	Golden D

Lank-Como Oil Co.

Gasoline	Motor Oil
Phillips 66	Phillips 66
Citgo	Citgo

Lyden Oil Co.

Gasoline	Motor Oil
Amoco (r,ur,usp,d)	Amoco
Citgo (r,ur,up)	Valvoline
Schio (r,ur,up,d)	Quaker State
	Sun Industrial
	Boron Industrial

MAPCO Petroleum Inc.

Gasoline	Motor Oil
Delta (r,ur,p,d)	Delta Non-Detergent
	Delta HD
	Delta 10W-40

Marathon Petroleum Co.

Gasoline	Motor Oil
MILE-maker Regular (r)	Multipower-3 Straight Weight
MILE-maker Lead-Free (ur)	V.E.P. Heavy Duty Motor Oil
SUPER-M Lead-Free (up)	Thoro Lube SC/CC
	Endurance Oil
	Thoro Lube 20W-40
	Multipower-3 15W-40 Motor Oil
	All-Season 10W-30 Motor Oil
	Superior All-Season 10W-40 Motor Oil
	577 Marafluid Super HT
	High Performance All-Season 20W-50

Martin Oil Marketing Ltd.

Gasoline	Motor Oil
Martin (r,ur,up,usp,d)	Martin Oil
	Martin HD
	Martin 10/30
	Martin 10/40

Merchants Oil

Gasoline	Motor Oil
Phillips 66	Phillips 66
	Pennzoil
	Shell

Merritt Truax Inc.

Gasoline	Motor Oil
Texaco (r,ur,usp,d)	
Arco (r,ur,usp,d)	
Shell (r,ur,usp)	
Chevron (r,ur,usp)	
Pacific Pride (r,ur,usp,d)	

Mid-Missouri Oil Co.

Gasoline	Motor Oil
Shell (r,ur,up)	Shell

Milder Oil Co. Inc.

Gasoline	Motor Oil
Texaco	Shield
	Cato-Mystik
	Texaco

Miller Enterprises Inc. (Handy Way Food Stores)

Gasoline	Motor Oil
Union 76 (r,ur,p,d)	Union 76
Handy Way (r,ur,p,up,d)	Quaker State

Miller Oil Co. (Va.)

Gasoline	Motor Oil
Amoco	
Exxon	
Phillips 66	

Mobil Oil Corp.

Gasoline	Motor Oil
Mobil Regular (r)	Mobil Regular
Mobil Unleaded (ur)	Mobil Heavy Duty
Mobil Super Unleaded (up)	Mobil Super 10W-30
	Mobil Super 10W-40
	Mobil Super 20W-50
	Mobil Super 5W-30
	Mobil 1

Murphy Oil USA Inc.

Gasoline	Motor Oil
Spur (r,ur,up,d)	

Musket Corp.

Gasoline	Motor Oil
Love's (r,ur,usp,d)	Double Eagle Recond. 30W
	Sup-R-Lub 30W
	Sup-R-Lub 20W
	Pennzoil 20W
	Pennzoil 30W
	Quaker State Red 30W

KEY:
Gasoline
(r) Regular
(ur) Unleaded regular
(p) Premium
(up) Unleaded premium
(sp) Super Premium
(usp) Unleaded super premium
(o) Other
(d) Diesel

Gasoline	Motor Oil
National Convenience Stores	
Stop-N-Go	
National Oil Co.	
Natco (r)	Natco 30
Natco Plus (ur)	Natco 10W-30
Natco Super (p)	Natco 10W-40
National Oil & Gas Inc.	
Phillips 66 (r,ur,d)	Phillips 66
Citgo (up)	Marathon
Gladieux (d)	Kendall
Marathon (r,ur,up)	Shell
	Mobil
Newell Oil Co. Inc.	
Good Gulf (r)	Gulf
Gulf Crest (ur)	
Gulf Super Unleaded (up)	
Gulf Dieselect (d)	
Noco Energy Corp.	
Noco (r,ur,up,d)	Noco
	Gulf
	Mobil
Pacific Northern Oil Co.	
Shell (r,ur,up)	
Panoco (r,ur,up)	
Curtis Parker Oil Co. Inc.	
Amoco (r,ur,up)	Amoco
Parker Oil Co. Inc.	
Union 76	Union 76
Exxon	Exxon
Shell	Shell
Citgo	Citgo
Petrol	Texaco
	Phillips 66
Peavey Oil Co.	
Texaco (r,ur,up,d)	Texaco
	Chevron
	Pennzoil
	Valvoline
Pennzoil Products Co.	
Pennzoil	Pennzoil
Fleetwing	
Pester Corp.	
Derby	Derby
	Quaker State
	Pennzoil
Pettway Oil Co.	
Amoco (r,ur,up)	Amolube
	Cash & Carry
	LDO
	Ultimate
Petroleum Marketers Inc.	
Shell (r,ur,up)	Citgo
Exxon (r,ur,up)	Exxon
Citgo (r,ur,up)	Shell
Phillips Petroleum Co.	
Phillips 66 (r,ur,up,usp)	Unique
	MM Motor Oil
	Trop-Artic
Pilot Oil Corp.	
Pilot (r,ur,up,d)	Pilot Economy Motor Oil
	Pilot Premium Motor Oil
Pride Oil Co. Inc. (Tenn.)	
Tenneco (r,ur,up)	Kendall
Publix Oil Co. Inc.	
Publix (r,ur,up,d)	
Phillips 66 (r,ur,up,d)	
Shell (r,ur,up)	
QuikTrip Corp.	
QuikTrip (r,ur,up,d)	Redline
Remote Services Inc./Conna Corp.	
Convenient (r,ur,up,d)	
River Oil Co.	
Phillips 66	Phillips 66
Kerr-McGee	Kerr-McGee
Robinson Oil Co. Inc.	
Rotten Robbie (r,ur,up,d)	
Ross Resources Inc.	
APCO	
Ryan-DeWitt Corp.	
Chevron (r,ur,up)	
Keystone (r,ur)	
Sahara Oil Co. Inc.	
Texaco	
Save-X USA Inc.	
Save-X (r,ur,up,d)	
Serv-N-Save (r,ur,up,d)	
Sears Oil Co. Inc. (N.Y.)	
Sears	Tri Pure
	Sears Premium
	Sears Supreme
Self Service Oil Co.	
U Pump (r,ur,up,d)	Pennzoil
Sprint (r,ur,up,d)	Quaker State
	Citgo
Shay Oil Co. Inc.	
Exxon	Exxon
Shell Oil Company	
SU-2000 (usp)	Shell Motor Oil
RU-2000 (ur)	Shell X-100
Shell Regular (r)	Shell Fire & Ice
Shores Oil Co.	
Union 76	
Shotmeyer Bros. Petroleum Corp.	
Mobil	Mobil
Shotmeyer Oil Corp.	
U-Save	
Mogas	
The SICO Company	
Amoco (r,ur,up)	Citgo
Arco (r,ur,up)	Arco
Texaco (r,ur,up)	Texaco
	Valvoline
	Amoco
	Quaker State
Simon Oil Co. Inc.	
Sunoco (r,ur,up)	
Mobil (r,ur,up)	
Smith-Shafer Oil Co.	
SS (r,ur,up,d)	SS
	Quaker State
SMO Inc.	
Texaco	Prize Penn
BP	BP
Arco	Arco
	Havoline
	Kendall
	Quaker State
SOS Oil Corp.	
Gulf	Gulf
Amoco	Amoco
SOS	Kendall
Southern Oil Co. Inc.	
Phillips 66	Phillips 66
	Quaker State
	Pennzoil
Spartan Petroleum Co. Inc.	
Chevron (r,ur,sp)	Chevron
	Zeroline
The Spencer Companies	
Amoco (r,ur,usp,d)	Amoco
Citgo (r,ur,up,d)	Citgo
	Quaker State
	Texaco
	Chevron
	Shell
SSG Corporation	
Auto-Stop (r,ur)	
The Standard Oil Company (Ohio)	
Octron (r)	HQD 30
Cetron (ur)	Premex 10W30
Super Cetron (up)	Boron 10W30
Diesel Supreme (d)	QVO 10W40
BP (r,ur,up)	Nitrex Turbo D 10W30
William Penn (r,ur,up)	Nitrex MPG 5W40
Gas & Go (r,ur,up)	
Gibbs (r,ur,up)	
Scot (r,ur,up)	
Steuart Petroleum Co.	
Steuart (r,ur,p,d)	Pennzoil
Sun Refining & Marketing Co.	
Regular (r,ur)	Diamond
Plus (up)	Sun Lube
Super Sunoco Ultra (usp)	Dynalube
Economy (d)	Special
	MPG Plus
Sunny Service Stations Inc.	
Sunny (r,ur,up,d)	Arco
	Chevron
	Quaker State
	Pennzoil
TCR Inc.	
TCR (r,ur,up,d)	TCR
Tenneco Oil Co.	
Tenneco (r,ur,up)	Shurlube
Direct (r,ur,up)	Tenneco Four Seasons
Trust (r,ur,up)	Tenneco Extra Heavy Duty Motor Oil
	Tenneco Special Detergent
	Tenneco Premium H.D. Motor Oil
	Tenneco Super H.D. Diesel Motor Oil
Texaco Inc.	
Texaco Regular (r)	Havoline Premium
Texaco Super (p)	Havoline Supreme
Texaco Super Regular w/Ethanol (p)	Havoline High Performance
Texaco Unleaded (ur)	
Texaco Premium Unleaded w/Ethanol (up)	
Texaco Super Unleaded (up)	
Texaco Super Unleaded w/Ethanol (up)	
Texas City Refining Inc.	
TCR (r,ur,usp,d)	
Texas Star Oil Co.	
Texas Star (r,ur,sp,d)	Superior
	Fleet
Thornhill Oil Co.	
Amoco	Amolube
	Amoco M-V
Tooley Oil Co.	
Shell (r,ur,usp)	
Tooley's (r,ur,sp,d)	
Total Petroleum Inc.	
Total (r,ur,up,usp,d)	Total Duralube
Vickers (r,ur,up,usp,d)	Total Super HD
APCO (r,ur,up,usp,d)	Total Superlube
Best (r,ur,up,usp,d)	Total 500

Gasoline	Motor Oil
Town Pump Inc. & Affiliates	
Town Pump	
Transit Oil Co.	
Mobil (r,ur,up,d) Shell (r,ur,up) Transit (r,ur,up,d)	
Trenton Oil Co.	
Amoco (r,ur,usp,d)	Amoco
Triton Inc.	
Phillips 66 (r,ur,up,d) Sav-A-Ton (r) Happy Stores (ur,up,d)	
Thrifty Oil Co.	
Thrifty Economy Go-Lo	
Ultramar Petroleum Inc.	
Ultramar (r,ur,up,d)	Ultramar
Mobil (r,ur,up)	Chevron
Getty (ur,up)	Mobil
Augsbury (r,ur,up)	
Union Oil Co. of California	
76 (r,ur,p,usp,d)	Union Heavy Duty Union Premium Union Guardol Union Super 10W-30 Union Super 10W-40 Union 20W-50 High Performance
United Refining Co.	
Kwik Fill (r,ur,up,d) Keystone (r,ur,up,d)	
Vicksburg Refining Inc.	
Citgo	Citgo
Wake Up Oil Co.	
Wake Up (r,ur,usp)	
Warelubco Inc.	
Wareco (r,ur,sp)	Wareco Premium Wareco Plus Wareco Super All Season
Webaco Oil Co.	
Citgo (r,ur,up)	Citgo
Ashland (r,ur,up)	
Webb Oil Company	
Rebel	
Webster Oil Co.	
Phillips 66	Phillips Pennzoil Quaker State Havoline Kendall Castrol
Wesson Inc.	
Texaco (r,ur,up,d) Mobil (r,ur,up,d) Arco (r,ur,up,d)	

KEY:
Gasoline
(r) Regular
(ur) Unleaded regular
(p) Premium
(up) Unleaded premium
(sp) Super Premium
(usp) Unleaded super premium
(o) Other
(d) Diesel

Gasoline	Motor Oil
Western Marketing Inc.	
Conoco (r,ur,up,d)	Conoco
Wickland Oil Co.	
Regal (r,ur,p,up)	
A.T. Williams Oil Co.	
Wilco (r,ur,up)	Wilco
J.H. Williams Oil Company	
Union 76 (r,ur,up,usp)	Union

Gasoline	Motor Oil
York Oil Co.	
Citgo (r,ur,up) Easy Go (r,ur,up)	
Zarda Bros. Dairy Inc.	
Amoco Kerr-McGee Zarda	
Zephyr Inc.	
Zephyr (r,ur,up)	Conoco Texaco Mobil Pennzoil

CHERRY CLAN
CHERRY CLAN
CHERRY CLAN
CHERRY CLAN
Ferrara Pan

TLS-250
V/R VEEDER-ROOT
LEAK DETECT
PRINT
FUNCTION
TANK
CURSOR
INCREMENT
NORMAL
SETUP
DIAG.
ALARM RESET
PAPER FEED

NEW! TLS-250 TANK LEVEL SENSOR...

Measures fuel inventories accurately and automatically... tests tanks on demand!

Tighten Inventory Control

TLS-250 tightens inventory control by continuously monitoring the fuel in your underground tanks. It provides detailed reports on fuel volume and height, temperature, water level, and the time and date at the touch of a button. Plus it helps speed shift changes, reduces inventory errors, spots losses from theft, leaks and meter miscalibration, and assists in implementing sound inventory practices.

Loss Detection = Environmental Protection

Unexplained inventory losses, even small ones, may be leaks that can cause severe environmental damage. Inventory control records from TLS are the first step in spotting them. Then you can switch immediately to "Leak Detect" for a closer look. If the test confirms your suspicions, you can take action fast!

▲

Sensing probes can be installed in either a 3" or 4" riser pipe. Simple two-wire connection. Probes come in various lengths to suit tank sizes.

Report and Alarm Features Add Station Security

TLS-250 features automatic reports and alarms that add extra security to your station. Reports to confirm bulk delivery amounts automatically. A high-level alarm to warn of overfill during bulk deliveries. And programmable low-fuel inventory and high water limit alarms. Plus, a sudden-loss alarm to detect rapid inventory changes caused by theft or a major tank failure during closed hours.

Flexible System Design

TLS systems feature an electronic sensing probe permanently installed in each tank, and up to eight tanks (single or manifolded) can be monitored by one system. Plus, TLS-250 can be field-programmed to match tank sizes, designs and fuel types.

In addition, a security key lock lets you select "normal" operation, "setup" to enter or change system and tank parameters, or "diagnostics" to check the system's hardware and software.

TLS-250—Part of a Total Management System

Through an RS-232 port, TLS-250 can interface with sophisticated electronic point-of-sale terminals and cash registers to form an integrated station management system. And it can communicate to a headquarters location via telecommunications networks to speed inventory reporting and reconcile station totals automatically.

For complete information and a detailed brochure on TLS-250, contact your nearest Veeder-Root Distributor. Or call Veeder-Root at (203) 527-7201.

Veeder-Root Company, 70 Sargeant Street, Hartford, CT 06102.

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Capital Spending in the Oil Industry: A 20-Year Overview at Home and Abroad

(Millions of Dollars)

	1984		1983		1982		1981		1980	
	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign	U.S.	Foreign
Marketing	—	—	$ 1,375	$ 3,330	$ 1,400	$ 3,700	$ 1,425	$ 3,775*	$ 1,300	$ 3,750
Refining (a)	—	—	5,100	17,075	7,550*	19,525*	7,250	18,325	5,650	16,125
Transportation	—	—	1,000	7,725	1,300	7,650	1,725	10,300	2,150	7,725
Production	—	—	37,275	36,575	52,275*	43,400*	51,700	41,675	33,100	33,775
Other	—	—	850	1,500	1,025	1,600	900	1,525	700	1,250
Total	—	—	**45,600**	**66,175**	**63,550***	**78,875***	**63,600**	**75,600**	**42,900**	**62,625**

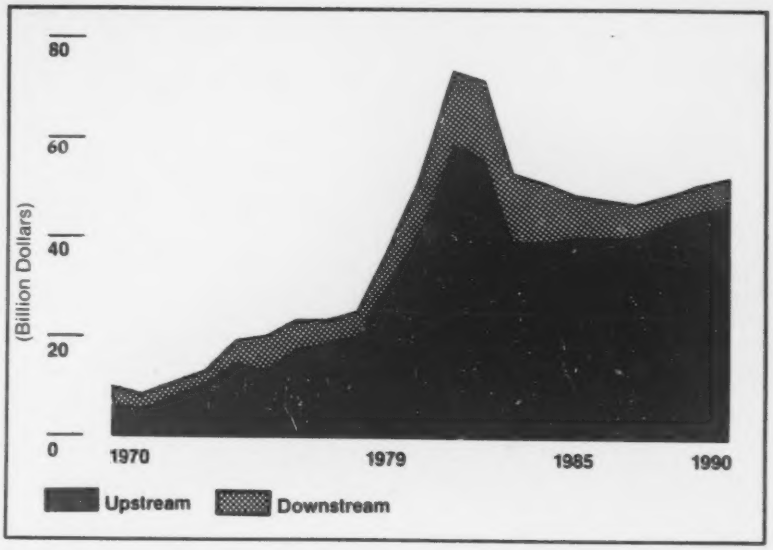
	1979		1978		1977		1976		1975	
Marketing	975	2,775	950	2,290	775	1,895	625	1,555	650	1,550
Refining (a)	4,625	14,385	4,050	13,275	3,770	10,965	3,775	7,635	3,600	8,270
Transportation	1,450	6,575	1,350	7,380	2,300	8,060	3,900*	12,350*	3,725	11,510
Production	24,600	24,465	17,650	20,055	15,180	17,280	13,460	12,315	9,380	9,875
Other	550	1,225	475	980	445	980	325	785	370	735
Total	**32,200**	**49,425**	**24,475**	**43,900**	**22,400**	**39,180**	**22,085**	**34,640**	**17,725**	**31,900**

	1974		1973		1972		1971		1970	
Marketing	650	1,565	850	1,630	1,100	1,725	1,350	2,030	1,450*	1,770
Refinery (a)	2,600	7,115	1,475	4,565	1,350	4,995	1,550	4,740	1,625	3,900
Transportation	1,660	9,760	550	7,230	425	4,580	675	3,435	550	2,915
Production	11,450	8,085	7,440	5,485	5,915	4,190	3,385	3,830	4,335	2,895
Other	325	550	325	445	260	450	290	515	265	420
Total	**16,625**	**27,075**	**10,640**	**19,355**	**9,050**	**15,900**	**7,250**	**14,550**	**8,225**	**11,900**

	1969		1968		1967		1966		1965	
Marketing	1,250	1,555	1,150	1,515	1,250	1,455	1,100	1,310	1,000	1,430
Refinery (a)	1,525	2,995	1,450	2,980	1,600	2,550	1,575	2,435	1,125	1,665
Transportation	400	2,600	475	2,280	400	1,740	300	1,755	265	1,510
Production	4,750	2,790	4,925	2,535	4,025	1,975	3,770	1,870	3,760	2,025
Other	250	260	350	240	375	205	380	180	225	170
Total	**8,175**	**10,200**	**8,350**	**9,550**	**7,650**	**7,925**	**7,125**	**7,550**	**6,375**	**6,800**

(a) Includes chemicals and petrochemicals.
*Peak years are indicated with asterisks.
Source: Chase Manhattan Bank, Capital Investments in The World Petroleum Industry.

Capital Requirements: A Five-Year Forecast



Conoco Inc., which is one of the few U.S. oil companies still making long-term projections for the domestic industry, added a new dimension to its annual forecast in 1985 with a report on capital investment needs through 1990.

[For other elements of the Conoco forecast, see the International and Supply/Demand sections of this issue].

Conoco believes the U.S. oil companies will need about $340-billion in capital spending during the 1983-1990 period. The lion's share, $300-billion, will be invested in the upstream side—exploration and production. The balance, about $40-billion, will be allocated to refining, transportation and marketing.

(Conoco says it uses different factors than Chase Manhattan Bank in arriving at capital spending projections, so its figures cannot be compared to the CMB data on page 33 of this section.)

Here are highlights of the Conoco study:

The projected spending is three times average annual expenditures during the 1970s when price controls depressed U.S. crude oil and natural gas prices. These massive capital outlays will be required at a time when the industry's internal cash-generation capability has been impaired by lower oil prices. There is a danger, too, that proposed government fiscal measures could reduce industry cash flow even further.

Upstream Investment

Exploration, development and production, the upstream side of the business, will continue to require the bulk of the industry's capital outlays. Despite lowered oil price expectations, some $250-billion will need to be invested from 1985 through 1990. This is only slightly less than spending during 1979-1984, which included unusually high outlays in 1981 and 1982 due to sharply higher world oil prices, expectations of future price increases, and U.S. oil price decontrol.

A $250-billion upstream investment program is consistent with (1) a continued historically high level of drilling activity of around 80,000 wells per year, (2) stable to slowly rising expenditures per well, (3) historical average reserve additions per well, and (4) maintenance of reserves at eight to nine years of production. An additional $50-billion of upstream investment would be required to maintain domestic oil and gas production at current levels.

Downstream Outlook

The downstream sector—refining, transportation and marketing—will require a lesser share of petroleum industry investment in the future due to current excess capacity. Nevertheless, about $40-billion will be needed over the 1985-1990 period to maintain and upgrade existing capacity. That is roughly the same as average annual downstream spending in the 1970s. Federal regulations requiring the phasedown of lead in gasoline will require significant investment in the octane enhancement capability of U.S. refineries. Also, considerable investment will be required to rationalize the natural gas and petroleum products pipeline networks to meet market needs.

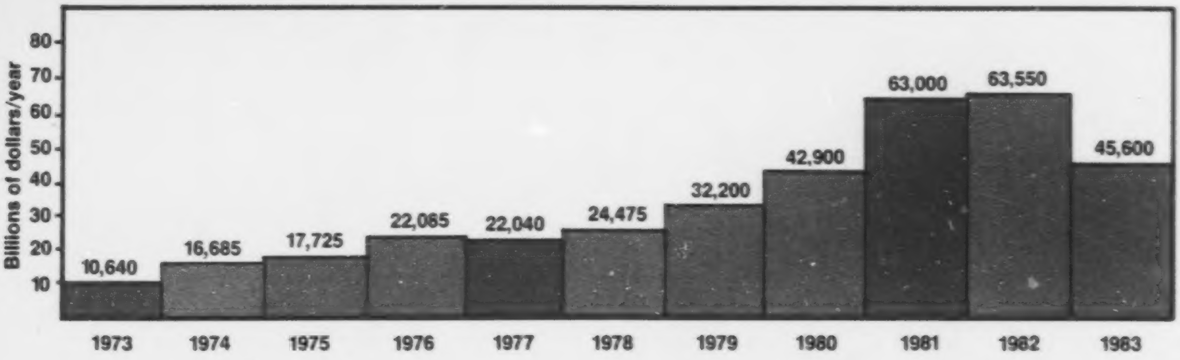
The U.S. petroleum industry is capable of obtaining the necessary funds for this aggressive investment program, either from internal sources or financial markets, the study says. This ability to fund required investment programs assumes that changes in taxation policies or other government regulations do not impair the industry's cash-generation capability.

Supply Problems

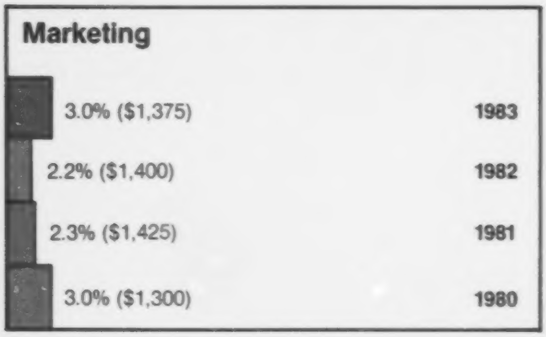
The United States will become increasingly dependent on potentially interruptible foreign oil supplies in the years ahead as oil demand grows very modestly but steadily and—despite the hundreds of billions of dollars that will be invested in exploration, development, and production—domestic oil production erodes. Past oil supply disruptions, which resulted in significantly reduced economic activity and employment, have occurred when import dependency was high. Thus, it is imperative that this nation take steps now that will reduce vulnerability to future oil supply interruptions.

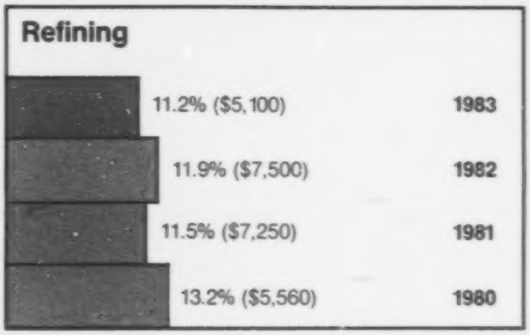
Building up the Strategic Petroleum Reserve to the targeted level of 750-million bbl. as quickly as is fiscally responsible is an important step toward insulating the U.S. from an oil supply disruption. Emphasis must also be placed on finding and developing additional oil supplies in the United States and other politically stable areas. Unfortunately, the current softness in world crude prices discourages investments to develop such supplies because of high costs and risks. Therefore, it remains imperative that government policies encourage the major new investments that need to be made today by the U.S. energy industry if adequate and affordable energy supplies are to be available to future generations.

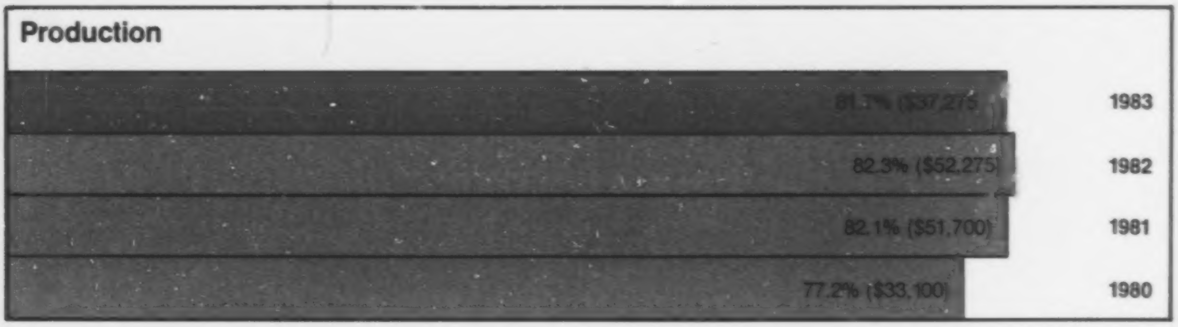
Capital Spending by U.S. Oil Companies

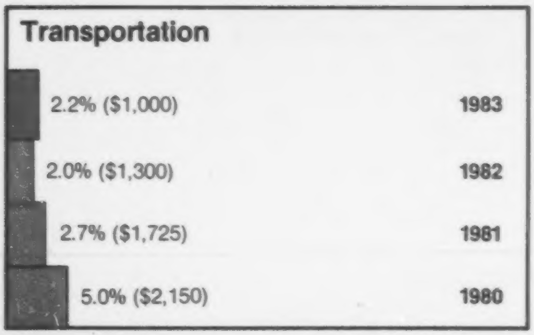


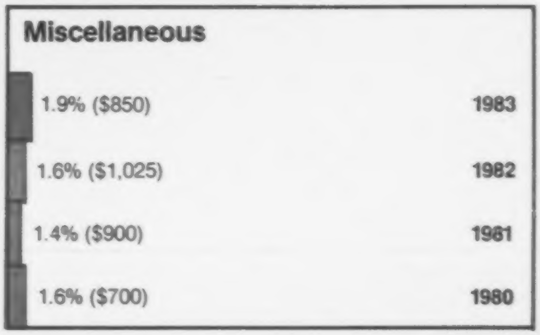
Spending by Divisions and Percentages (millions of dollars)











Source: Chase Manhattan Bank, New York, NY

FUNNY, IT DOESN'T LOOK LIKE A CPA.

But a Southwest dispenser keeps books like one: gathering, processing, and recording information with faultless precision. Even with CPA-like prudence, preserving a back-up data set.

Now that there's lots of entries in the station management arena, there's also lots of confusion. Southwest, as an elder statesman, would like to clear the air with some down-home common sense observations.

Basically, any station management system performs two jobs: gathering information and communicating that information.

Any EE will tell you that the communication and most of the information gathering involved are relatively simplistic tasks. But there's one information gathering job that's a real pistol: counting the gasoline.

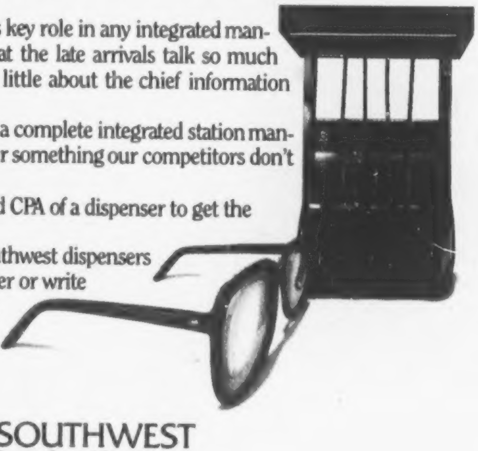
That job involves designing electronics delicate enough to accurately measure a volatile liquid yet sturdy enough to survive the unforgiving environment of a pump island.

Considering the dispenser's key role in any integrated management system, it's curious that the late arrivals talk so much about bells and whistles and so little about the chief information gathering device.

Naturally, Southwest offers a complete integrated station management system, but we also offer something our competitors don't seem to want to talk about.

A flinty-eyed, tough-minded CPA of a dispenser to get the toughest job done.

To find out more about Southwest dispensers and systems, call Rush Winchester or write Southwest Pump Company, P.O. Drawer 280, Bonham, Texas 75418, (214) 583-3134. Distributors and Jobbers nationwide.



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How Oil Companies Handle

			BRANDED SERVICE STATIONS			
MAJOR OIL COMPANIES	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	Supplied Directly	Supplied Through Jobbers and Commission Agents	Lessee/ Dealer Operated	Salary Operated
Amoco Oil Co.	15,652(A)	36	4,907	10,745	4,807	167
Atlantic Richfield	3,884(B)(C)	22	2,726	1,158	—	—
Chevron USA	10,618(D)	38(D)	5,192	5,426	10,517	98
Exxon Co. USA	18,139(F)	38	6,588	11,551	—	—
Mobil Oil Corp.	13,862	41	6,410	7,452	12,450	1,412
Shell Oil Co.	11,010	38	4,750	6,260	4,515(G)	235(G)
Texaco	19,558	46	3,895	15,663	3,006	143
SEMI-MAJOR OIL COMPANIES						
American Petrofina, Inc.	4,385(H)	22	0	4,385	—	—
Ashland Petroleum Co.	1,910	26	513	1,397	154	513
Citgo Petroleum Co.	3,599	31	83	3,516	52	31
Conoco Inc.*	5,091	40	—	—	—	—
Crown Central Petroleum Co.	188	7	—	—	—	—
Diamond Shamrock Corp.	2,060(I)	24	523	1,537	0	523
Kerr-McGee Refining Corp.	1,839(J)	18	138	1,701	1,772	67
Marathon Oil Co.	2,299	6	678	1,621	483	0
Murphy Oil Co.	591	14	489	102	207	384
Phillips Petroleum Co.	9,705(K)	34	284	9,501	—	190
Standard Oil Cc. (Ohio)	8,560(L)	30	3,070	5,490	—	—
Sun Co.	6,425(M)	29	3,050	3,375	6,360	65
Tenneco Oil Co.	423	15	423	0	3	417
Union Oil Co. of Calif.	10,365	42	3,074	7,291	2,055	137
INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS						
Ada Resources	115	1	53	62	10	11
Acme Retail, Inc.	40	2	35	5	—	—
Angus I. Hines, Inc.	40	1	—	—	6	22
Arkansas Valley Petroleum	34	2	34	0	25	9
Armour Oil Co.	85	5	85	0	—	—
A.T. Williams Oil Co.	70	2	—	—	0	70
Automatic Comfort Corp.	43	1	43	0	18	23
Bagwell Oil Co., Inc.	18	2	18	0	10	0
Barney Holland Oil Co.	71(N)	1	37	7	36	0
Beacon Oil Co.	275	3	150	175	200	75
Best Oil Co.	17	1	13	4	2	15
Boswell Oil Co.	—	5	—	—	—	—
Bray Terminals, Inc.	35	3	7	28	28	7
Brennan Petroleum Co.	3	1	—	—	—	—
Browning Oil Co.	30(O)	1	—	30	23	0
By Rite Oil Co.	93(P)	2	93	0	70	23
California Target Enterprises	150(Q)	1	150	0	0	0
Campbell Oil Co.	60	1	60	0	60	0
Cannon Oil Corporation	18	3	—	—	0	18
Cardon Corporation	52	5	0	52	0	52
Cel Oil Products Corp.	16	1	16	0	2	6
Cenex	1,067(R)	14	1,067	0	1,067	0
Certified Oil Co.	150	3	150	0	50	100
Charter Marketing Co.	437	9	437	0	68	369
Circle K Corporation	1,731(S)	22	—	—	—	—
Coast Oil Co.	59(T)	1	59	0	29	30
Coen Oil Co.	250	3	250	0	248	0
Colonial Oil Ind.	64(U)	7	64	0	0	64
Comet Oil Co.	4	2	4	0	—	—
Cook & Cooley Inc.	100	1	100	0	100	0
Consumers Gasoline Stations	31	3	31	0	0	31
Consumers Oil Corp.	16	2	16	0	4	11
Crystal Flash Petroleum Corp.	0	1	—	—	—	—
Crystal Petroleum Co.	15	1	15	0	15	0
Crystal U.S.A. Oil, Inc.	0	5	55	0	40	15
C.S.C. Oil Co.	21	2	21	0	0	21
Curtis Parker Oil Co. Inc.	46	1	34	12	46	0
Dairy Mart, Inc.	26	3	26	12	0	0
DeBlois Oil Co.	39(V)	2	39	0	8	31
Dennis K. Burke, Inc.	1	6	1	0	—	—
Desert Oil Co.	5	1	—	—	—	—
Dicky Inc.	6	1	6	0	0	6
Drake's Refining Station	14	1	14	0	0	14
D&W Oil Co.	3	—	3	0	—	—
East Coast Oil Corp.	33	1	33	0	0	33
E.M. Bailey Dist. Co.	44	3	23	21	40	2

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† Includes District of Columbia.

*Did not respond—year-end 1983 data.

(A) Includes Omega Oil Co. (67 outlets).

(B) Includes Prestige Stations Inc.

(C) In May, Arco announced plans to withdraw from refining and marketing operations east of the Mississippi River, and concentrate on a five-state western region.

(D) Excludes Gulf stations acquired in early 1985. The 7,922 Gulf stations give Chevron 18,540 outlets in 42 states.

Product Distribution

				BRANDED JOBBERS/COMMISSION AGENTS			
					Number selling . . .		
Commission-Operated	Full Service only	Self-Service only	Self-Service/ Full Service	Total	Gasoline only	Fuel Oil only	Gasoline/ Fuel Oil
—	5%	25%	70%	1,832	—	—	—
—	—	—	—	133	133	0	0
0	2,716	294	7,608	568(E)	297	78	493
—	—	—	—	889	22	0	867
0	—	—	—	1,585	47	573	965
0(G)	582(G)	1,127(G)	3,041(G)	658	10	83	565
746	4,678	5,286	9,594	1,574	—	—	—
—	439	2,631	1,315	519	441	0	78
1,243	1,000	600	310	219	11	1	207
0	—	—	—	284	258	3	23
—	—	—	—	760	—	—	—
—	—	—	—	—	—	—	—
0	100	1,710	250	170	170	0	0
0	50	245	1,544	440	50	12	378
0	958	354	987	97	0	0	97
—	34	528	29	0	0	0	0
—	—	—	—	1,566	—	—	—
—	—	—	—	470	—	—	—
0	—	—	—	—	—	—	—
0	0	420	3	0	0	0	0
8,173	10%	25%	65%	404	5%	0	95%
—	—	11	10	16	0	0	16
—	0	40	0	40	35	0	5
12	4	34	2	—	—	—	—
0	0	34	0	0	—	—	—
—	—	85	—	0	—	—	—
0	0	70	0	—	—	—	—
2	17	25	1	1	1	0	0
8	12	6	0	0	—	—	—
1	22	2	13	1	0	0	1
0	0	200	75	60	60	0	0
0	2	15	0	0	—	—	—
—	—	—	—	—	—	—	—
0	28	7	0	6	0	0	6
—	—	—	—	0	—	—	—
7	8	3	19	0	—	—	—
0	45	23	25	0	—	—	—
0	0	150	0	0	—	—	—
0	30	20	10	0	—	—	—
0	0	18	0	0	—	—	—
0	0	49	3	0	—	—	—
8	3	13	0	—	—	—	—
0	0	0	1,067	1,067	0	0	1,067
0	0	0	150	0	—	—	—
0	10	427	0	0	—	—	—
—	—	—	—	0	—	—	—
0	0	35	24	0	—	—	—
2	90	10	150	0	—	—	—
0	7	5	52	0	—	—	—
—	—	—	—	0	—	—	—
0	0	100	0	0	—	—	—
0	8	22	1	—	—	—	—
1	16	0	0	0	—	—	—
—	—	—	—	0	—	—	—
0	0	5	10	1	1	0	0
0	15	30	10	0	—	—	—
0	0	8	13	0	—	—	—
0	9	13	25	2	0	0	2
38	1	37	0	—	—	—	—
0	24	13	3	0	—	—	—
—	1	0	0	0	—	—	—
—	—	—	—	0	—	—	—
0	1	5	0	2	—	—	2
0	2	10	2	0	—	—	—
—	3	—	—	0	—	—	—
0	0	33	0	0	—	—	—
2	34	2	8	7	—	--	7

(E) Includes 285 branded lube oil jobbers.
(F) Includes Alert stations.
(G) Figures are for direct-supplied stations only.

(H) Includes Finaserve Inc., Petron Inc., Porto Fina Oil Co.
(I) Includes Sigmor Retail, Autotronic Systems Inc.
(J) Includes Triangle Refineries (retail only).

BULK PLANTS				TERMINALS				
Company-Operated				Company-Operated				
Total	Salary-Operated	Commission-Operated	Jobber-Operated Bulk Plants	Total	Salary-Operated	Commission-Operated	Jobber-Operated Terminals	**MAJOR OIL COMPANIES**
0	0	0	2,228	86	86	0	—	Amoco Oil Co.
0	0	0	—	43	43	0	—	Atlantic Richfield
28	3	25	829	89	88	1	19	Chevron USA
4	3	1	—	66	66	0	—	Exxon Co. USA
1,348	84	51	1,213	84	84	0	—	Mobil Oil Corp.
85	85	0	646	13	13	0	0	Shell Oil Co.
1,099	—	—	—	78	—	—	—	Texaco
								SEMI-MAJOR OIL COMPANIES
0	—	—	415	9	9	0	1	American Petrofina, Inc.
156	1	138	17	42	42	0	0	Ashland Petroleum Co.
0	0	0	—	32	28	0	—	Citgo Petroleum Co.
0	—	—	—	62	—	—	—	Conoco Inc.
—	—	—	—	—	—	—	—	Crown Central Petroleum Co.
0	0	0	0	13	13	0	0	Diamond Shamrock Corp.
1	1	0	380	2	1	0	1	Kerr-McGee Refining Corp.
244	1	0	1	50	50	0	0	Marathon Oil Co.
0	0	0	0	22	22	0	—	Murphy Oil Co.
53	4	2	—	31	31	0	4	Phillips Petroleum Co.
90	0	90	—	57	57	0	—	Standard Oil Co. (Ohio)
—	—	—	—	39	—	—	—	Sun Co.
3	3	0	0	11	11	0	—	Tenneco Oil Co.
259	54	171	34	58	58	0	0	Union Oil Co. of Calif.
								INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS
4	2	2	16	0	—	—	—	Ada Resources
0	—	—	—	0	—	—	—	Acme Retail, Inc.
6	6	0	—	0	—	—	—	Angus I. Hines, Inc.
0	—	—	—	0	—	—	—	Arkansas Valley Petroleum
0	—	—	—	3	3	—	—	Armour Oil Co.
4	0	4	—	—	—	—	—	A.T. Williams Oil Co.
2	2	0	0	2	2	0	0	Automatic Comfort Corp.
1	1	0	—	1	1	0	—	Bagwell Oil Co., Inc.
3	1	0	2	0	—	—	—	Barney Holland Oil Co.
20	0	0	20	58	0	58	0	Beacon Oil Co.
0	—	—	—	0	—	—	—	Best Oil Co.
—	—	—	—	3	3	0	—	Boswell Oil Co.
2	2	0	6	2	2	0	0	Bray Terminals, Inc.
0	—	—	—	0	—	—	—	Brennan Petroleum Co.
2	2	0	—	0	—	—	—	Browning Oil Co.
7	6	1	—	1	1	0	—	By Rite Oil Co.
0	—	—	—	0	—	—	—	California Target Enterprises
3	—	—	—	0	—	—	—	Campbell Oil Co.
0	—	—	—	0	—	—	—	Cannon Oil Corporation
0	—	—	—	0	—	—	—	Cardon Corporation
1	1	0	—	—	—	—	—	Cel Oil Products Corp.
0	0	0	960	7	7	0	0	Cenex
12	12	0	—	2	2	0	—	Certified Oil Co.
0	—	—	—	0	—	—	—	Charter Marketing Co.
0	—	—	—	0	—	—	—	Circle K Corporation
3	3	0	—	0	—	—	—	Coast Oil Co.
2	2	0	0	0	—	—	—	Coen Oil Co.
1	1	0	75	2	2	0	2	Colonial Oil Ind.
0	—	—	—	0	—	—	—	Comet Oil Co.
0	—	—	—	0	—	—	—	Cook & Cooley Inc.
—	—	—	—	—	—	—	—	Consumers Gasoline Stations
0	—	—	—	1	1	0	—	Consumers Oil Corp.
3	2	1	—	0	—	—	—	Crystal Flash Petroleum Corp.
1	0	0	0	0	—	—	—	Crystal Petroleum Co.
0	—	—	—	0	—	—	—	Crystal U.S.A. Oil, Inc.
0	—	—	—	0	—	—	—	C.S.C. Oil Co.
3	1	2	1	0	—	—	0	Curtis Parker Oil Co., Inc.
—	—	—	—	—	—	—	—	Dairy Mart, Inc.
3	3	0	—	1	1	0	—	DeBlois Oil Co.
1	1	0	0	1	1	0	—	Dennis K. Burke, Inc.
0	—	—	—	0	—	—	—	Desert Oil Co.
3	3	0	0	0	—	—	0	Dicky Inc.
0	—	—	—	0	—	—	—	Drake's Refining Station
3	—	—	—	0	—	—	—	D&W Oil Co.
0	—	—	—	0	—	—	—	East Coast Oil Corp.
4	1	3	0	0	—	—	0	E.M. Bailey Dist. Co.

(K) Includes Aero Oil.

(L) Includes BP Oil Inc., Boron Oil Co., Truckstops of America.

(M) Includes Herr Gas & Oil Co., Mid-State Oil Co., Montou Auto Service Co. Inc., Mascot Petroleum Co., Stop-N-Go Foods Inc., King Kwik Minit Markets Inc.

(N) Includes Decatur Oil Co.

(O) Includes Tri-County Oil Co., Rally Marketing.

(P) Includes Beacon Oil Co.

How Oil Companies Handle

INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	BRANDED SERVICE STATIONS			
			Supplied Directly	Supplied Through Jobbers and Commission Agents	Lessee/ Dealer Operated	Salary Operated
Englefield Oil Co.	223	3	223	0	175	48
FCX, Inc.	98	2	98	0	0	98
Fireline Petroleum Inc.	430	11	430	0	0	430
Flying J Inc.	70	9	70	0	0	70
Fortmeyer's Inc.	—	1	—	—	—	—
Foster Oil Co.	40	1	39	1	33	7
Franko Oil Co.	96	2	90	96	50	46
Gas-N-Go, Inc.	1	1	1	0	0	1
Gasco Gasoline, Inc.	79	1	79	0	11	54
Gem Petroleum	327(W)	2	277	50	0	0
Giant Industries	10	3	—	—	0	10
Globe Oil Co. U.S.A.	103	6	—	—	—	—
Golden Gate Petroleum Co.	0	7	—	—	—	—
Gresham Petroleum Co.	23	1	23	0	7	4
Gull Industries, Inc.	100	2	100	0	0	7
Guttman Oil Co.	—	4	—	—	—	—
Harris Enterprises, Inc.	40	2	40	0	30	10
Hawaiian Independent Ref.	10(Y)	1	10	0	0	10
Highland Petroleum, Inc.	—	10	—	—	—	—
Highway Oil, Inc.	216(Z)	24	216	0	0	216
Hinkle Enterprises	11	1	11	0	7	4
Holland Oil Co.	53	1	53	0	20	33
Horkey Oil Co., Inc.	29	1	0	29	9	20
Huck's Convenience Store	110	5	95	15	0	110
Hughes Oil Co.	106	1	106	0	40	6
Hull Oil Co.	28	2	28	0	8	6
Hunt Oil Co.	175	5	1	174	25	100
Huntley Jiffy, Inc.	50	2	50	0	0	50
Independent Stations Co.	4	1	0	4	—	—
Jack Griffith Pet. Prod.	10	1	—	—	—	—
Jacobus Co.	10	1	—	—	—	—
J.H. Williams Oil Co.	80(AA)	1	77	3	77	3
J&L Oil, Inc.	59	3	59	0	5	54
Johnson Products, Inc.	67	6	59	8	0	59
J.S.&J. Service, Inc.	16(BB)	2	16	0	0	16
Kaibab Petroleum Co.	35	1	35	—	0	35
Kelley-Williamson Co.	45(CC)	2	35	10	33	12
Key Energy Enterprises Inc.	42(DD)	5	41	1	0	11
Kickapoo Oil Co. Inc.	56	1	56	—	—	56
Kimber Petroleum Corp.	175	1	175	—	165	10
Kimbro Oil Co.	38	1	—	—	30	8
Kingston Oil Supply Corp.	60(EE)	1	50	10	56	3
Kirschner Bros. Oil Co.	35	2	—	—	—	—
Kittie Petroleum Inc.	13	1	13	—	—	—
Kwik Shop Inc.	110	3	110	—	—	—
Land O'Lakes Inc.	387	8	384	3	384	3
Lido Co. of New England	100	3	100	—	—	—
Lyden Oil Co.	143	1	143	—	129	14
Mapco Petroleum Inc.	302	13	302	—	—	297
Martin Oil Marketing Ltd.	72	9	72	0	0	72
McDowell Oil Service Inc.	30	1	30	—	—	—
McLeiee Oil Inc.	65	1	—	—	—	—
Merchants Oil	55	1	55	—	—	—
Merritt-Truax Inc.	83(FF)	2	67	16	43	31
Mid-Missouri Oil Co.	8	1	8	—	2	6
Milder Oil Co. Inc.	10	2	—	—	—	—
Miller Enterprises Inc.	100	1	62	38	—	100
Miller Oil Co.	3(GG)	1	—	3	3	—
Monarch Oil & Supply Co.	20	1	20	—	18	1
Musket Corp.	119	9	119	—	—	119
National Convenience Stores	73(HH)	11	51	22	0	25
National Oil Co.	103	9	—	103	103	—
National Oil & Gas Inc.	65	2	50	15	64	0
Newell Oil Co. Inc.	13	1	13	—	10	—
Noco Energy Corp.	21	1	21	—	—	21
Pacer Oil Co.	20	2	20	—	2	18
Pacific Northern Oil Co.	36	1	36	—	13	14
Parker Oil Co. Inc.	175	2	175	—	175	—
Peavey Oil Co.	8	1	8	—	4	4
Pennzoil Products Co.	630	7	58	32	38	20

(Q) Includes P&M Service Stations Inc.
(R) Includes Gas Up Inc.
(S) Includes Little General Stores, U-Totem Stores.
(T) Includes Norcal Petroleum Co., Richards Distributors Inc., Mission Trail Oil Co., Coast Oil Stations Inc.
(U) Includes Interstate Stations Inc., Colonial Interstate Inc.

Product Distribution (cont'd.)

				BRANDED JOBBERS/COMMISSION AGENTS			
					Number selling . . .		
Commission-Operated	Full Service only	Self-Service only	Self-Service/ Full Service	Total	Gasoline only	Fuel Oil only	Gasoline/ Fuel Oil
0	55%	64%	104%	4	0	0	4
0	0	98	0	0	—	—	—
0	20	233	177	0	—	—	—
0	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—
0	1	2	31	0	—	—	—
0	82	14	0	0	—	—	—
0	0	1	0	0	—	—	—
14	0	68	11	0	—	—	—
50	0	327	0	50	0	0	50
—	0	10	0	0	—	—	—
—	—	—	—	0	—	—	—
—	—	—	—	1	—	—	1
12	6	14	3	0	—	—	—
93	0	75	25	0	—	—	—
—	—	—	—	—	—	—	—
0	38	2	0	0	—	—	—
0	0	10	0	0	—	—	—
—	—	—	—	—	—	—	—
0	117	19	80	0	—	—	—
0	2	3	6	—	—	—	—
0	20	20	13	0	—	—	—
0	0	20	9	—	—	—	—
0	0	110	0	0	—	—	—
60	10	66	30	1	0	1	0
14	0	24	4	0	—	—	—
50	—	155	20	20	0	0	20
0	0	50	0	0	—	—	—
—	0	1	3	1	1	0	0
—	—	—	—	0	—	—	—
—	—	—	—	—	—	—	—
0	35	3	42	1	0	0	1
0	4	55	0	0	—	—	—
8	30	8	29	8	8	0	0
0	0	16	0	0	—	—	—
0	0	35	0	—	—	—	—
—	28	12	5	5	0	0	5
31	0	32	10	0	—	—	—
—	0	56	—	0	—	—	—
—	175	—	—	0	—	—	—
—	0	8	30	—	—	—	—
1	56	3	1	3	1	—	2
—	—	—	—	—	—	—	—
—	2	11	—	—	—	—	—
—	—	110	—	0	—	—	—
—	84	131	172	384	—	—	384
—	—	—	—	—	—	—	—
1	12	8	123	—	—	—	—
5	—	302	—	—	—	—	—
0	1	71	—	0	—	—	—
30	0	30	—	—	—	—	—
—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—
9	40	43	—	0	—	—	—
—	1	7	—	0	—	—	—
—	—	—	—	—	—	—	—
—	—	100	—	2	—	—	2
—	—	—	3	—	—	—	—
1	18	1	1	0	—	—	—
—	—	119	—	0	—	—	—
48	0	73	—	0	—	—	—
—	—	103	—	15	—	—	15
1	10	5	50	14	—	—	14
3	3	—	10	—	—	—	—
—	16	5	—	—	—	—	—
—	1	19	—	—	—	—	—
9	36	—	—	0	—	—	—
—	15	150	10	—	—	—	—
—	8	—	—	—	—	—	—
0	38	20	0	161	—	—	—

(V) Includes Beacon Oil Co.
(W) Includes Smith Service Oil
(Y) Includes Promana Inc.

(Z) Includes Hi-Lo Co. Inc., Workingman's Friend Oil Inc., Cook Oil Co. Inc., Fairway Oil Inc.
(AA) Includes Pioneer Oil Co.
(BB) Includes Terminal Stations Inc.

BULK PLANTS				TERMINALS				
	Company-Operated				Company-Operated			
Total	Salary-Operated	Commission-Operated	Jobber-Operated Bulk Plants	Total	Salary-Operated	Commission-Operated	Jobber-Operated Terminals	MAJOR OIL COMPANIES
10	9	1	0	0	—	—	0	Englefield Oil Co.
23	—	—	—	0	—	—	—	FCX, Inc.
0	—	—	—	1	1	0	—	Fireline Petroleum Inc.
—	—	—	—	—	—	—	—	Flying J Inc.
1	—	—	—	0	—	—	—	Fortmeyer's Inc.
3	0	0	1	0	—	—	—	Foster Oil Co.
0	—	—	—	0	—	—	—	Franko Oil Co.
0	—	—	—	0	—	—	—	Gas-N-Go, Inc.
0	—	—	—	0	—	—	—	Gasco Gasoline, Inc.
1	0	1	1	0	—	—	—	Gem Petroleum
0	—	—	—	—	—	—	—	Giant Industries
0	—	—	—	0	—	—	—	Globe Oil Co. U.S.A.
2	2	0	0	3	3	0	0	Golden Gate Petroleum Co.
4	—	—	—	0	—	—	—	Gresham Petroleum Co.
0	—	—	—	0	—	—	—	Gull Industries, Inc.
9	—	—	—	11	—	—	—	Guttman Oil Co.
2	—	—	—	0	—	—	—	Harris Enterprises, Inc.
0	—	—	—	0	—	—	—	Hawaiian Independent Ref.
—	—	—	—	—	—	—	—	Highland Petroleum, inc.
0	—	—	—	0	—	—	—	Highway Oil, Inc.
1	1	0	—	0	—	—	—	Hinkle Enterprises
0	—	—	—	0	—	—	—	Holland Oil Co.
2	2	0	—	0	—	—	—	Horkey Oil Co., Inc.
0	—	—	—	0	—	—	—	Huck's Convenience Store
2	2	0	1	0	—	—	0	Hughes Oil Co.
1	1	0	—	0	—	—	—	Hull Oil Co.
5	0	0	5	2	2	0	5	Hunt Oil Co.
0	—	—	—	0	—	—	—	Huntley Jiffy, Inc.
—	—	—	—	—	—	—	—	Independent Stations Co.
0	—	—	—	0	—	—	—	Jack Griffith Pet. Prod.
10	—	—	—	2	—	—	—	Jacobus Co.
4	3	1	0	0	—	—	0	J.H. Williams Oil Co.
0	—	—	—	0	—	—	—	J&L Oil, Inc.
0	—	—	0	0	—	—	0	Johnson Products, Inc
0	—	—	—	0	—	—	—	J.S.&J. Service, Inc.
0	—	—	—	0	—	—	—	Kaibab Petroleum Co.
6	1	5	0	—	—	—	—	Kelley-Williamson Co.
2	2	—	—	0	—	—	—	Key Energy Enterprises Inc.
0	—	—	—	0	—	—	—	Kickapoo Oil Co. Inc.
0	—	—	—	0	—	—	—	Kimber Petroleum Corp.
—	—	—	—	—	—	—	—	Kimbro Oil Co.
6	6	—	2	8	7	—	1	Kingston Oil Supply Corp.
—	—	—	—	—	—	—	—	Kirschner Bros. Oil Co.
—	—	—	—	—	—	—	—	Kittie Petroleum Inc.
0	—	—	—	0	—	—	—	Kwik Shop Inc.
367	—	—	365	3	3	—	0	Land O'Lakes Inc.
—	—	—	—	—	—	—	—	Lido Co. of New England
3	3	—	—	—	—	—	—	Lyden Oil Co.
—	—	—	—	1	1	—	—	Mapco Petroleum Inc.
0	—	—	—	3	3	—	—	Martin Oil Marketing Ltd.
1	1	—	—	—	—	—	—	McDowell Oil Service Inc.
—	—	—	—	—	—	—	—	McLeieer Oil Inc.
1	1	—	—	—	—	—	—	Merchants Oil
5	5	—	—	0	—	—	—	Merritt Truax Inc.
0	—	—	—	0	—	—	—	Mid-Missouri Oil Co.
1	—	—	—	—	—	—	—	Milder Oil Co. Inc.
—	—	—	—	—	—	—	—	Miller Enterprises Inc.
3	3	—	—	1	1	—	—	Miller Oil Co.
1	1	—	—	—	—	—	—	Monarch Oil & Supply Co.
0	—	—	—	0	—	—	—	Musket Corp.
0	—	—	—	0	—	—	—	National Convenience Stores
15	—	15	15	15	—	—	15	National Oil Co.
12	—	12	—	0	—	—	—	National Oil & Gas Inc.
1	—	—	1	—	—	—	—	Newell Oil Co. Inc.
2	2	—	—	1	1	—	—	Nuco Energy Corp.
2	2	—	—	—	—	—	—	Pacer Oil Co.
1	1	—	—	1	1	—	—	Pacific Northern Oil Co.
9	9	—	—	1	1	—	—	Parker Oil Co. Inc.
—	—	—	—	—	—	—	—	Peavey Oil Co.
15	3	3	9	5	3	0	2	Pennzoil Products Co.

(CC) Includes G.W. Corp.
(DD) Includes Key Food Marts Inc., Key Petroleum Inc., Key Fuelstops Inc.
(EE) Includes Amos Post Co., Paramount Oil Co.
(FF) Includes Columbia Sales
(GG) Includes Millar Company South
(HH) Includes Stop N Go Markets of Texas Inc., Colonial Food Stores Inc., Stop N Go Markets of Georgia Inc.

How Oil Companies Handle

INDEPENDENT OIL COMPANIES AND SELECTED OIL JOBBERS	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	BRANDED SERVICE STATIONS			
			Supplied Directly	Supplied Through Jobbers and Commission Agents	Lessee/ Dealer Operated	Salary Operated
Pester Corp.	100	10	100	—	—	100
Pettway Oil Co.	46(II)	3	—	46	27	17
Petroleum Marketers Inc.	110(JJ)	2	110	0	9	31
Pilot Oil Corp.	106	11	104	2	—	106
Pride Oil Co. Inc. (Miss.)	25	2	25	—	3	1
Pride Oil Co. Inc. (Tenn.)	14	1	14	—	—	14
Publix Oil Co. Inc.	105(KK)	4	105	0	96	9
Quiktrip Corp.	201	4	201	—	—	201
Racetrac Petroleum Inc.	249	13	—	—	—	—
Republic Oil Corp.	4(LL)	1	4	—	—	4
Remote Services Inc.	268	9	268	—	—	—
Reynolds Industries Inc.	5(MM)	2	5	—	2	3
River Oil Co.	38(NN)	2	38	—	38	—
Robinson Oil Co. Inc.	22(OO)	1	22	—	—	22
Ross Resources, Inc.	21	2	21	0	10	11
Ryan-Dewitt Corp.	31	1	29	2	21	8
Sahara Oil Co., Inc.	22	1	22	0	4	17
Santee Oil Co., Inc.	57	1	57	0	53	4
Save-X, USA, Inc.	24(PP)	2	24	0	0	0
SCASCO	40	1	40	0	31	6
Schaeffer Oil, Inc.	5	5	28	3	0	0
Sears Oil Co., Inc.	12	1	12	0	11	1
Self Service Oil Co.	16	4	16	0	0	16
Shay Oil Co., Inc.	17	1	0	17	3	14
Shores Oil Co.	42	1	42	0	42	0
Shotmeyer Bros. Pet. Corp.	72	1	—	—	—	—
Shotmeyer Oil Corp.	37(QQ)	3	—	—	—	—
The SICO Co.	207	3	207	0	97	22
Simon Oil Co., Inc.	129	1	129	0	122	7
Smith-Shafer Oil Co.	6	1	6	0	0	6
SMO, Inc.	128(RR)	2	128	0	98	24
SOS Oil Co.	63	1	—	—	—	—
Southern Oil Co., Inc.	14	1	14	0	7	5
Spartan Petroleum Co. Inc.	59	2	59	0	59	0
The Spencer Companies Inc.	64(SS)	1	64	0	4	15
SSG Corporation	30	2	—	—		—
Steuart Pet. Co.	45	7	45	0	25	20
Sumrall Oil Serv., Inc.	85	2	85	0	83	2
Sunny Serv. Stations, Inc.	11	1	—	—	—	—
Taylor Oil Co.	54	2	54	0	0	0
TCR, Inc.	28	3	28	0	2	26
Texas City Refining, Inc.	26	8	26	0	0	26
Texas Star Oil Co.	34	1	34	0	0	34
Thornhill Oil Co., Inc.	26	1	—	—	—	—
Tooley Oil Co.	10	2	10	0	0	10
Tosco Corporation	9	0	—	—	—	—
Total Petroleum, Inc.	1,847(TT)	22	448	1,399	1,399	448
Town Pump & Affiliates	65	3	65	0	30	35
Transit Oil Co.	2	2	2	0	0	2
Trenton Oil Co., Inc.	50	2	50	0	45	0
Triton Incorporated	42	5	—	—	—	—
Thrifty Oil Co.	—	1	—	—	—	—
Truman Arnold Co.	85	6	85	0	0	49
Ultramar Pet. Inc.	93	2	75	18	53	30
United Marketing	285	3	285	—	—	285
United Refining Co.	291	3	291	—	5	286
United States Oil Inc.	9	1	9	—	1	1
Vicksburg Refining Inc.	27(VV)	2	17	10	1	4
Wake Up Oil Co. Inc.	42	1	42	—	1	41
Warelubco Inc.	90	8	89	1	—	—
Warren Equities Inc.	259	8	259	—	99	160
Wavaho Oil Co. Inc.	12	1	12	—	—	1
Webaco Oil Co. Inc.	10	1	10	—	—	10
Webb Oil Co.	20	1	20	—	10	10
Webster Oil Co.	25	3	25	—	19	3
Wesson Inc.	27	1	27	—	16	11
Western Marketing Inc.	28	1	28	—	2	26
Wickland Oil Co.	85(VV)	3	85	—	—	85
York Oil Co. Inc.	9(WW)	1	9	—	—	9
Zarda Brothers Dairy Inc.	8	2	3	—	3	5
Zephyr Inc.	55	3	50	5	5	50

(II) Includes Handy Andy Pantries.

(JJ) Includes Whiting Oil, Stop In Food Stores.

(KK) Includes Scotland Oil Co. Inc., Dalton Oil Co. Inc., Dillon Service Co. Inc., Hay Oil Co. Inc.

(LL) Includes Dixxie Diesel Truck Stops.

(MM) Includes Port Oil Corp.

(NN) Includes River Oil Co. of Jackson, Tenn.

Product Distribution (cont'd.)

				BRANDED JOBBERS/COMMISSION AGENTS			
					Number selling . . .		
Commission-Operated	Full Service only	Self-Service only	Self-Service/ full Service	Total	Gasoline only	Fuel oil only	Gasoline/ fuel oil
—	0	98%	2%	—	—	—	—
—	2	17	27	—	—	—	—
2	—	31	79	0	—	—	—
—	1	105	0	0	—	—	—
21	1	23	1	0	—	—	—
—	—	12	2	—	—	—	—
—	10	74	21	0	—	—	—
—	—	201	—	0	—	—	—
—	—	—	—	—	—	—	—
—	—	4	—	—	—	—	—
268	—	268	—	268	265	—	3
—	5	—	—	—	—	—	—
—	—	—	—	—	—	—	—
—	—	22	0	0	—	—	—
0	0	18	3	0	—	—	—
2	4	6	21	2	—	—	—
1	2	20	0	2	2	0	0
0	41	4	12	0	—	—	—
24	0	24	0	0	—	—	—
3	25	5	10	0	—	—	—
28	0	28	0	—	—	—	—
0	10	2	0	0	—	—	—
0	0	16	0	16	16	0	0
0	0	17	0	1	0	0	1
0	20	0	22	0	—	—	—
—	—	—	—	—	—	—	—
—	—	—	—	0	—	—	—
88	85	108	19	0	—	—	—
0	82	14	33	0	—	—	—
0	0	6	0	0	—	—	—
6	41	46	41	6	6	—	—
—	59	0	4	0	—	—	—
2	10	3	1	0	—	—	—
0	0	25	34	0	—	—	—
20	6	31	28	2	0	0	3
—	—	—	—	—	—	—	—
0	0	45	0	0	—	—	—
0	0	75	10	—	—	—	—
—	—	—	—	—	—	—	—
54	0	54	0	0	—	—	—
0	1	27	0	0	—	—	—
0	0	26	0	0	—	—	—
0	0	34	0	0	—	—	—
—	—	—	—	—	—	—	—
0	0	10	0	0	—	—	—
—	—	—	—	0	—	—	—
0	0	790	1,057	1,399	0	0	1,399
0	0	65	0	65	0	0	65
0	0	2	0	0	—	—	—
5	50	0	0	0	—	—	—
—	—	—	—	—	—	—	—
—	—	—	—	0	—	—	—
36	0	85	0	1	0	0	1
10	52	30	11	5	2	0	3
—	140	144	1	0	—	—	—
—	163	128	—	—	—	—	—
8	1	6	2	0	—	—	—
22	1	26	—	1	—	—	1
—	3	—	39	0	—	—	—
—	1	5	84	0	—	—	—
—	64	165	30	—	—	—	—
11	—	3	9	—	—	—	—
—	—	10	--	—	—	—	—
—	—	10	10	—	—	—	—
3	2	15	8	—	—	—	—
12	11	4	0	—	—	—	0
—	—	27	1	—	—	—	—
—	1	84	—	0	—	—	—
0	—	9	—	—	—	—	—
—	5	3	—	—	—	—	—
—	16	29	10	5	—	—	5

(OO) Includes Trail Oil Co.
(PP) Includes Serv-N-Save Inc.
(QQ) Includes United States Oil Corp.
(RR) Includes Delmarva Oil Inc.
(SS) Includes Alabama Oil Co., Midsouth Oil Co.
(TT) Includes Huron Valley Oil Co.

BULK PLANTS				TERMINALS				
	Company-Operated				Company-Operated			
Total	Salary-Operated	Commission-Operated	Jobber-Operated Bulk Plants	Total	Salary-Operated	Commission-Operated	Jobber-Operated Terminals	MAJOR OIL COMPANIES
—	—	—	—	—	—	—	—	Pester Corp.
1	—	—	—	—	—	—	—	Pettway Oil Co.
8	8	—	—	1	1	—	—	Petroleum Marketers Inc.
0	—	—	—	0	—	—	—	Pilot Oil Corp.
0	—	—	—	0	—	—	—	Pride Oil Co. Inc. (Miss.)
—	—	—	—	—	—	—	—	Pride Oil Co. Inc. (Tenn.)
7	7	0	0	4	4	0	0	Publix Oil Co. Inc.
—	—	—	—	—	—	—	—	Quiktrip Corp.
1	—	1	—	—	—	—	—	Racetrac Petroleum Inc.
—	—	—	—	—	—	—	—	Republic Oil Corp.
0	—	—	—	0	—	—	—	Remote Services Inc.
—	—	—	—	—	—	—	—	Reynolds Industries Inc.
3	3	—	—	—	—	—	—	River Oil Co.
0	—	—	—	0	—	—	—	Robinson Oil Co. Inc.
0	—	—	—	0	—	—	—	Ross Resources, Inc.
6	4	2	0	1	1	—	0	Ryan-Dewitt Corp.
2	0	2	2	0	—	—	0	Sahara Oil Co., Inc.
0	—	—	—	0	—	—	—	Santee Oil Co., Inc.
0	—	—	—	0	—	—	—	Save-X, USA, Inc.
6	6	0	—	0	—	—	—	SCASCO
—	—	—	—	—	—	—	—	Schaeffer Oil, Inc.
0	—	—	—	4	4	0	—	Sears Oil Co., Inc.
0	—	—	0	0	—	—	0	Self Service Oil Co.
1	0	0	1	—	—	—	1	Shay Oil Co., Inc.
1	—	—	—	0	—	—	—	Shores Oil Co.
1	1	0	—	—	—	—	—	Shotmeyer Bros. Pet. Corp.
3	2	1	—	0	—	—	—	Shotmeyer Oil Corp.
19	19	0	—	1	1	0	—	The SICO Co.
0	—	—	—	0	—	—	—	Simon Oil Co., Inc.
1	0	1	—	0	—	—	—	Smith-Shafer Oil Co.
7	7	0	0	1	1	0	0	SMO, Inc.
3	3	0	—	0	—	—	—	SOS Oil Co.
1	1	0	—	0	—	—	—	Southern Oil Co., Inc.
1	—	—	—	0	—	—	—	Spartan Petroleum Co.
0	—	—	0	0	—	—	0	The Spencer Companies Inc.
—	—	—	—	—	—	—	—	SSG Corporation
0	—	—	—	7	7	0	—	Steuart Pet. Co.
—	—	—	—	—	—	—	—	Sumrall Oil Serv., Inc.
0	—	—	—	0	—	—	—	Sunny Serv. Stations, Inc.
0	—	—	—	2	2	0	—	Taylor Oil Co.
0	—	—	—	0	—	—	—	TCR, Inc.
0	—	—	—	2	2	0	—	Texas City Refining, Inc.
0	—	—	—	0	—	—	—	Texas Star Oil Co.
3	3	0	—	—	—	—	—	Thornhill Oil Co., Inc.
0	—	—	—	0	—	—	—	Tooley Oil Co.
0	—	—	—	31	6	0	—	Tosco Corporation
12	2	0	10	15	6	0	9	Total Petroleum, Inc.
2	2	0	0	0	—	—	—	Town Pump & Affiliates
0	—	—	—	0	—	—	—	Transit Oil Co.
0	—	—	—	0	—	—	—	Trenton Oil Co., Inc.
—	—	—	—	—	—	—	—	Triton Incorporated
0	—	—	—	3	—	—	—	Thrifty Oil Co.
0	—	—	1	1	1	0	0	Truman Arnold Co.
7	6	1	0	4	4	0	0	Ultramar Pet. Inc.
—	—	—	—	2	2	—	—	United Marketing
—	—	—	—	1	1	—	—	United Refining Co.
0	—	—	—	0	—	—	—	United States Oil Inc.
1	—	1	0	0	—	—	—	Vicksburg Refining Inc.
0	—	—	—	0	—	—	—	Wake Up Oil Co. Inc.
1	1	—	—	0	—	—	—	Warelubco Inc.
5	5	—	—	1	1	—	—	Warren Equitie Inc.
—	—	—	—	—	—	—	—	Wavaho Oil Co. Inc.
—	—	—	—	—	—	—	—	Webaco Oil Co. Inc.
—	—	—	—	—	—	—	—	Webb Oil Co.
2	—	—	—	—	—	—	—	Webster Oil Co.
—	—	—	0	—	—	—	—	Wesson Inc.
1	1	—	—	—	—	—	—	Western Marketing Inc.
0	—	—	—	1	1	—	—	Wickland Oil Co.
3	3	—	—	—	—	—	—	York Oil Co. Inc.
—	—	—	—	—	—	—	—	Zarda Brothers Dairy Inc.
2	—	2	45	2	2	—	—	Zephyr Inc.

(UU) Includes Dinkins Petroleum Inc.
(VV) Includes Regal Stations Inc.
(WW) Includes Easy Go Stores.

Branded Retail Outlets

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England					Middle Atlantic			
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
Acme Retail, Inc.	40	2	—	—	—	—	—	—	—	—	—
American Petrofina Inc.	4,385(A)	22	—	—	—	—	—	—	—	—	—
Amoco Oil Company	15,652(B)	36	—	—	—	288	18	224	393	484	825
Angus I. Hines Inc.	40	1	—	—	—	—	—	—	—	—	—
Arkansas Valley Petro.	34	2	—	—	—	—	—	—	—	—	—
Ashland Oil Co.	1,910	15	—	—	—	—	—	—	—	—	61
Atlantic Richfield Co.	3,384 (TT) (UU)	22	—	9	12	191	54	115	298	149	841
A.T. Williams Oil Co.	70	2	—	—	—	—	—	—	—	—	—
Automatic Comfort Corp.	43	1	—	—	—	—	—	43	—	—	—
Bagwell Oil Co., Inc.	18	2	—	—	—	—	—	—	—	—	—
Best Oil Co.	17	1	—	—	—	—	—	—	—	—	17
Bray Terminals Inc.	35	3	—	—	4	4	—	—	27	—	—
Browning Oil Co.	30(D)	1	—	—	—	—	—	—	—	—	—
By Rite Oil Co.	93(E)	2	—	—	—	—	—	—	—	—	—
Campbell Oil Co.	70	1	—	—	—	—	—	—	—	—	—
Cannon Oil Corporation	18	3	—	—	—	—	—	—	—	—	—
Cardon Corporation	52	5	—	—	—	—	—	—	—	—	—
Cel Oil Products Corp.	16	1	—	—	—	—	—	—	—	—	—
Cenex	1,067(G)	14	—	—	—	—	—	—	—	—	—
Certified Oil Company	150	3	—	—	—	—	—	—	—	—	—
Charter Marketing Co.	437	9	3	12	—	71	—	67	—	—	—
Chevron Corporation	10,618(H)	38	82	19	4	65	11	178	442	237	197
Circle K Corporation	1,731(I)	22	—	—	—	—	—	—	—	—	—
Citgo Petroleum Corporation	3,599	31	158	64	55	120	5	82	388	235	75
Coen Oil Company	250	3	—	—	—	—	—	—	—	—	75
Colonial Oil Industries, Inc.	64(K)	3	—	—	—	—	—	—	—	—	—
Comet Oil Co.	4	2	—	—	—	—	—	—	—	—	—
Consumers Gasoline Stations Inc.	31	3	—	—	—	—	—	—	—	—	—
Consumers Oil Corp.	16	2	—	—	—	—	—	—	13	3	—
C.S.C. Oil Company	21	2	—	—	—	—	—	—	—	—	—
Crystal Petroleum Co. Inc.	55	5	—	—	—	—	—	—	—	—	—
Dairy Mart Inc.	26	3	—	—	—	(X)	(X)	(X)	—	—	—
DeBlois Oil Company	39(L)	2	—	—	—	13	26	—	—	—	—
Dennis K. Burke Inc.	1	1	—	—	—	1	—	—	—	—	—
Diamond Shamrock Refining & Marketing Co.	2,060(T)	24	—	—	—	—	—	—	4	—	1
Dickey Inc.	6	1	—	—	—	—	—	—	—	—	—
D&W Oil Co.	3	1	—	—	—	—	—	—	—	—	—
East Coast Oil Corp.	33	1	—	—	—	—	—	—	—	—	—
E.M. Bailey Dist. Co.	44	3	—	—	—	—	—	—	—	—	—
Englefield Oil Co.	223	2	—	—	—	—	—	—	—	—	—
Exxon Co., USA	18,139(M)	38	259	98	—	271	36	169	400	735	1,088
FCX, Inc.	98	2	—	—	—	—	—	—	—	—	—
Fireline Pet. Inc.	430	11	41	34	13	136	46	56	81	13	7
Flying J Inc.	70	9	—	—	—	—	—	—	—	—	—
Fortmeyer's, Inc.	(X)	1	—	—	—	—	—	—	—	—	—
Foster Cil Co.	40	1	—	—	—	—	—	—	—	—	—
Franko Oil Co.	96	2	—	—	—	—	—	—	—	—	—
Gas-N-Go, Inc.	1	1	—	—	—	—	—	—	—	—	—
Gasco Gasoline, Inc.	79	1	—	—	—	—	—	—	—	—	—
Gem Petroleum	327(N)	2	—	—	—	—	—	—	—	—	—
Giant Ind. Inc.	10	3	—	—	—	—	—	—	—	—	—
Globe Oil Co., USA	103	6	—	—	—	—	—	—	—	—	—
Gresham Pet. Co.	23	1	—	—	—	—	—	—	—	—	—
Gull Ind., Inc.	100	2	—	—	—	—	—	—	—	—	—
Guttman Oil Co.	(X)	3	—	—	—	—	—	—	—	—	(X)
Harris Enterprises, Inc.	40	2	—	—	—	—	—	—	—	—	—
Hawaiian Independent Ref.	10(O)	1	—	—	—	—	—	—	—	—	—
Highland Petroleum, Inc.	(X)	10	—	—	—	—	—	—	—	—	—
Highway Oil, Inc.	216(P)	24	—	2	2	—	—	—	23	—	22
Hinkle Enterprises, Inc.	11	1	—	—	—	—	—	—	—	—	—
Holland Oil Co.	53	1	—	—	—	—	—	—	—	—	—
Horkey Oil Co., Inc.	29	1	—	—	—	—	—	—	—	—	—
Huck's Convenience Stores	110	5	—	—	—	—	—	—	—	—	—
Hughes Oil Co.	106	1	—	—	—	—	—	—	—	—	—
Hull Oil Co.	28	2	—	—	—	—	—	—	—	—	—
Hunt Oil Co.	175	6	—	—	—	—	—	—	—	—	—
Huntley Jiffy, Inc.	(X)	2	—	—	—	—	—	—	—	—	—
Independent Stations Co.	4	1	—	—	—	—	—	—	—	—	4
Jack Griffith Petroleum Prod.	10	1	—	—	—	—	—	—	—	—	—
Jacobus Co.	10	1	—	—	—	—	—	—	—	—	—
J.H. Williams Oil Co., Inc.	80(Q)	1	—	—	—	—	—	—	—	—	—
J&L Oil, Inc.	59	3	26	19	4	7	3	—	8	—	—
Johnson Prod., Inc.	67	6	—	—	—	—	—	—	—	—	—
J.S.&J. Service, Inc.	16(R)	2	—	—	—	—	—	—	—	—	—

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† Includes District of Columbia

(X) Did not provide figures

(A) Includes Finaserve Inc., Petcon Inc., Porto Fina Oil Co.

(B) Includes Omega Oil Co. (67 outlets).

(C) Includes Decatur Oil Co.

(D) Includes Tri-County Oil Co., Rally Marketing Co.

(E) Includes Beacon Oil Co.

(F) Includes P&M Service Stations Inc.

in the United States

South Atlantic									East North Central					East South Central			
Del.	Md.	D.C.	Va.	W.Va.	N.C.	S.C.	Ga.	Fla.	Ohio	Ind.	Ill.	Mich.	Wis.	Ky.	Tenn.	Ala.	Miss.
—	—	—	—	—	25	15	—	—	—	—	—	—	—	—	—	—	—
—	—	—	16	—	90	170	526	525	—	—	4	—	—	7	226	140	40
32	346	51	573	—	1,054	528	798	715	522	634	1,194	835	538	15	760	702	420
—	—	—	(X)	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1
—	—	—	38	328	—	—	—	—	310	52	19	27	72	880	—	—	—
40	90	3	59	1	—	—	—	—	1	—	208	—	—	—	—	—	—
—	—	—	31	—	39	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	1	—	17	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	(X)	—	—	—
—	—	—	—	—	—	—	—	—	2	—	—	91	—	—	—	—	—
—	—	—	—	—	—	—	—	—	70	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	1	2	—	—	—	—	—	—	—	15	—
—	—	—	1	—	—	—	—	—	—	—	1	—	—	—	—	—	—
—	—	—	—	—	—	16	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	150	—	—	—	—
—	—	—	—	10	—	—	—	—	135	—	—	—	5	—	—	—	—
—	—	—	—	—	—	—	2	42	—	—	—	—	—	—	—	—	51
19	15	—	17	59	57	100	995	909	3	9	—	—	—	1,002	132	984	571
—	—	—	—	—	(X)	—	(X)	(X)	(X)	—	—	—	—	(X)	—	(X)	(X)
—	21	—	127	8	165	42	172	362	25	118	198	121	192	32	62	211	70
—	—	—	—	25	—	—	—	—	150	—	—	—	—	—	—	—	—
—	—	—	—	—	6	27	31	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	2	2	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	4	26	1	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	12	—	—	—	—	9	—	—	—
—	—	—	—	—	—	—	1	2	—	—	—	—	—	—	1	40	1
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	13	—	2	4	2	5	—	—	—	—	—	1	5	—	—
—	—	—	—	—	—	—	—	—	—	—	—	14	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	3	—	—	—	—	—
—	—	—	33	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	2	—	—	40	2	—	—
—	—	—	26	—	—	—	—	—	179	—	—	—	—	—	—	—	—
74	519	58	1,021	596	1,874	975	623	579	—	—	—	—	—	—	927	413	225
—	—	—	—	—	70	28	—	—	—	—	—	—	—	—	—	—	—
3	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	(X)	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	40	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	1	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	50	277	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	5	11	68	18	—	—	—	—	—	—	—	1	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	23
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	(X)	—	—	—	—	(X)	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	5	—	—	5	—	—	1	30	32	10	—	3	—	8	7	2	2
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	53	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	5	91	—	—	5	5	—	—
—	—	—	—	—	—	—	—	106	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	27	—	—	—	—	—	—	—	1	—
—	—	—	—	—	—	—	—	5	—	—	—	—	—	—	—	75	35
—	—	—	—	—	—	—	(X)	(X)	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	10	—	—	—	—
—	—	—	—	—	—	—	—	80	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	6	—	—	—	39	—	14	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

(G) Includes Gas Up Inc.

(H) Excludes Gulf stations acquired in early 1985. The 7,922 Gulf stations give Chevron 18,540 outlets in 42 states.

(I) Includes Little General Stores, U-Totem Stores.

(J) Includes Norcal Petroleum Co., Richards Distributors Inc., Mission Trail Oil Co., Coast Oil Stations Inc.

(K) Includes Interstate Stations Inc., Colonial Interstate Inc.

(L) Includes Beacon Oil Co.

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England						Middle Atlantic		
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
Kaibab Pet. Co.	35	1	—	—	—	—	—	—	—	—	—
Kelly-Williamson Co.	45(U)	2	—	—	—	—	—	—	—	—	—
Kent Oil Co.	25	1	—	—	—	—	—	—	—	—	—
Key Energy Enterprises, Inc.	80(V)	5	—	—	—	—	—	—	—	—	—
Kerr-McGee Refining Corp.	1,839(S)	22	—	—	—	—	—	—	—	—	—
Kickapoo Oil Co., Inc.	56	1	—	—	—	—	—	—	—	—	—
Kimber Petroleum Corp.	175	1	—	—	—	—	—	—	—	175	—
Kimbro Oil Co.	38	1	—	—	—	—	—	—	—	—	—
Kingston Oil Supply Co.	60(W)	1	—	—	—	—	—	—	60	—	—
Kirschner Bros. Oil Co.	35	2	—	—	—	—	—	—	—	20	15
Kittie Petroleum, Inc.	13	1	—	—	—	—	—	—	—	—	—
Kwik Shop, Inc.	110	3	—	—	—	—	—	—	—	—	—
Land O'Lakes, Inc.	387	8	—	—	—	—	—	—	—	—	—
Lank-Como Oil Co.	80	1	—	—	—	—	—	—	—	—	—
Lido Co. of New England	100	3	(X)	(X)	—	—	(X)	—	—	—	—
Lyden Oil Co.	143	1	—	—	—	—	—	—	—	—	—
Major Brands Dist.	(X)	5	—	—	—	—	—	—	—	—	—
MAPCO Petroleum Inc.	302	13	—	—	—	—	—	—	—	—	—
Marathon Petroleum Co.	2,299	6	—	—	—	—	—	—	—	—	—
Martin Oil Marketing, Ltd.	72	9	—	—	—	—	—	—	—	—	—
McDowell Oil Serv, Inc.	30	1	—	—	—	—	—	—	—	—	30
McLeieer Oil, Inc.	65	1	—	—	—	—	—	—	—	—	—
Merchants Oil	55	1	—	—	—	—	—	—	—	—	—
Merritt Truax, Inc.	83(Y)	2	—	—	—	—	—	—	—	—	—
Mid-Missouri Oil Co.	8	1	—	—	—	—	—	—	—	—	—
Milder Oil Co., Inc.	10	2	—	—	—	—	—	—	—	—	—
Miller Enterprises, Inc.	36	1	—	—	—	—	—	—	—	—	—
Miller Oil Co.	42(Z)	2	—	—	—	—	—	—	—	—	—
Mobil Oil Corp.	13,862	41	266	183	142	635	79	473	1,757	464	1,192
Monarch Oil & Supply Co.	20	1	—	—	—	—	—	—	—	—	—
Murphy Oil USA, Inc.	591	14	—	—	—	—	—	—	—	—	—
Musket Corp.	119	9	—	—	—	—	—	—	—	—	—
National Convenience Stores	73(AA)	11	—	—	—	—	—	—	—	—	—
National Oil Co.	103	9	—	—	—	—	—	—	—	—	—
National Oil & Gas Co.	65	2	—	—	—	—	—	—	—	—	—
Newell Oil Co., Inc.	13	1	—	—	—	—	—	—	—	—	—
Noco Energy Corp.	21	1	—	—	—	—	—	—	21	—	—
Pacer Oil Co.	20	2	—	—	—	—	—	—	—	—	—
Pacific Northern Oil Co.	36	1	—	—	—	—	—	—	—	—	—
Parker Oil Co., Inc.	175	2	—	—	—	—	—	—	—	—	—
Peavey Oil Co.	8	1	—	—	—	—	—	—	—	—	—
Pennzoil Prods. Co.	630	7	—	—	—	—	—	—	16	—	174
Pester Corp.	100	10	—	—	—	—	—	—	—	—	—
Pettway Oil Co.	46(BB)	3	—	—	—	—	—	—	—	—	—
Petroleum Marketers, Inc.	110(CC)	2	—	—	—	—	—	—	—	—	—
Phillips Petroleum Co.	9,705(FF)	34	—	—	—	—	—	—	—	—	91
Pilot Oil Corp.	106	11	—	—	—	—	—	—	—	1	1
Pride Oil Co., Inc.	25	2	—	—	—	—	—	—	—	—	—
Pride Oil Co, Inc.	14	1	—	—	—	—	—	—	—	—	—
Publix Oil Co., Inc.	105(DD)	5	—	—	—	—	—	—	—	—	—
Quiktrip Corp.	201	4	—	—	—	—	—	—	—	—	—
Racetrac Pet., Inc.	249	13	—	—	—	—	—	—	—	—	—
Republic Oil Corp.	4(EE)	1	—	—	—	—	—	—	—	—	—
Remote Services, Inc.	268	9	—	4	—	—	—	—	13	—	—
Reynolds Ind. Inc.	5(GG)	2	1	—	—	4	—	—	—	—	—
River Oil Co.	38(HH)	2	—	—	—	—	—	—	—	—	—
Robinson Oil Co., Inc.	22(II)	1	—	—	—	—	—	—	—	—	—
Ross Resources, Inc.	21	2	—	—	—	—	—	—	—	—	—
Ryan-Dewitt Corp.	31	1	—	—	—	—	—	—	31	—	—
Sahara Oil Co., Inc.	22	1	—	—	—	—	—	—	—	—	—
Santee Oil Co., Inc.	57	1	—	—	—	—	—	—	—	—	—
Save-X, USA, Inc.	35	12	—	—	—	—	—	—	—	—	—
SCASCO	40	1	—	—	—	—	—	40	—	—	—
Schaffer Oil Inc.	31	5	—	—	—	—	—	—	—	—	—
Sears Oil Co. Inc.	12	1	—	—	—	—	—	—	12	—	—
Self Service Oil Co.	16	4	—	—	—	—	—	—	—	—	—
Shay Oil Co., Inc.	17	1	—	—	—	—	—	—	—	—	—
Shell Oil Company	11,010	38	—	9	—	164	39	126	236	195	
Shores Oil Company	42	1	—	—	—	—	—	—	—	—	—
Shotmeyer Bros. Petroleum Corp.	72(KK)	1	—	—	—	—	—	—	72	—	—
Shotmeyer Oil Corp.	37	3	—	—	—	—	—	—	1	35	—
SICO Company	207	3	—	—	—	—	—	—	—	57	149
Simon Oil Company Inc.	129	1	—	—	—	—	—	—	129	—	—
Smith-Shafer Oil Co.	6	1	—	—	—	—	—	—	—	—	—
SMO Inc.	128(LL)	2	—	—	—	—	—	—	—	—	—

(M) Includes Alert stations
(N) Includes Smith Service Oil
(O) Includes Promana Inc.
(P) Includes Hi-Lo Co. Inc., Workingman's Friend Oil Inc., Cook Oil Co. Inc., Fairway Oil Inc.
(Q) Includes Pioneer Oil Co.
(R) Includes Terminal Stations Inc.
(S) Includes Triangle Refineries (retail only).
(T) Includes Sigmor Retail, Autotronic Systems Inc.

South Atlantic									East North Central					East South Central			
Del.	Md.	D.C.	Va.	W.Va.	N.C.	S.C.	Ga.	Fla.	Ohio	Ind.	Ill.	Mich.	Wis.	Ky.	Tenn.	Ala.	Miss.
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	42	—	3	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	2	35	—	—	—	—	—	6	6	31	—
—	—	—	1	—	—	—	—	8	—	33	120	1	123	13	25	10	8
—	—	—	—	—	—	—	—	—	—	—	—	—	56	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	38	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	5	77	—	—	—	—
—	—	—	—	—	—	—	—	80	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	143	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	9	9	6	—	—	—	—	30	96	25	19
—	—	—	—	—	—	—	—	—	794	516	318	576	2	93	—	—	—
—	—	—	—	—	—	—	5	—	1	18	40	4	1	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	65	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	36	—	—	—	—	—	—	—	—	—
—	—	—	38	—	4	—	—	—	—	—	—	—	—	—	—	—	—
65	146	1	161	23	161	40	25	411	344	203	515	738	594	26	294	24	—
—	—	—	—	—	—	—	—	—	—	20	—	—	—	—	—	—	—
—	—	—	17	—	23	10	46	122	—	—	—	3	97	4	55	83	20
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1	—	—
—	—	—	—	—	—	—	(X)	(X)	—	—	—	—	—	—	(X)	—	(X)
—	—	—	—	—	—	—	—	—	—	—	3	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	4	61	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	173	—	2	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	132	—	—	—	—	271	12	—	8	—	17	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	(X)	—	—	—	—	—	—	—	(X)	(X)	—
—	—	—	105	5	—	—	—	—	—	—	—	—	—	—	—	—	—
—	76	—	277	69	547	303	295	478	116	362	580	94	277	139	269	313	176
—	—	—	15	1	9	—	7	10	2	—	—	—	—	15	43	2	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	3	22
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	14	—	—
—	—	—	—	—	15	15	15	—	—	—	—	—	—	5	55	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	6	115	3
—	1	—	8	—	4	7	39	40	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	12	—	—	19	—	25	29	—	—	148	17	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	36	—	2
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	57	—	—	—	—	—	—	—	—	—	—	—
—	—	—	32	—	3	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	4	—	6	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
13	235	7	191	2	507	277	522	749	467	365	646	686	139	332	347	425	309
—	—	—	—	—	—	—	—	—	—	—	—	42	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	6	—	—	—	—	—	—
4	124	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

(U) Includes G.W. Corp.
(V) Includes Key Food Marts Inc., Key Petroleum Inc., Key Fuelstops Inc.
(W) Includes Amos Post Co., Paramount Oil Co.
(Y) Includes Columbia Sales.
(Z) Includes Miller Co. South
(AA) Includes Stop N Go Markets of Texas Inc., Colonial Food Stores Inc., Stop N Go Markets of Georgia Inc.
(BB) Includes Handy Andy Pantries.

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	New England						Middle Atlantic		
			Maine	N.H.	Vt.	Mass.	R.I.	Conn.	N.Y.	N.J.	Pa.
SOS Oil Corp.	63	1	—	—	—	—	—	—	63	—	—
Southern Oil Co. Inc.	14	1	—	—	—	—	—	—	—	—	—
Spartan Petroleum Co., Inc.	59	2	—	—	—	—	—	—	—	—	—
The Spencer Companies Inc.	64(MM)	1	—	—	—	—	—	—	—	—	—
SSG Corporation	30	2	—	—	—	—	—	—	—	—	—
The Standard Oil Company (Ohio)	8,560(PP)	30	(X)	(X)	(X)	(X)	(X)	(X)	—	(X)	(X)
Steuart Petroleum Co.	45	3	—	—	—	—	—	—	—	—	—
Sumrall Oil Services, Inc.	85	2	—	—	—	—	—	—	—	—	—
Sun Refining & Marketing Co. Inc.	6,425(QQ)	29	25	36	—	336	109	148	545	550	844
Sunny Service Stations	11	1	—	—	—	—	—	—	—	—	—
Taylor Oil Co.	54	2	—	—	—	—	—	—	—	—	—
TCR Inc.	28	3	—	—	—	—	—	—	—	—	—
Tenneco Oil Company Processing and Marketing	423	15	—	—	—	—	—	3	—	—	—
Texaco Inc.	19,558	46	170	102	96	453	86	293	457	420	817
Texas City Refining Inc.	26	8	—	—	—	—	—	—	—	—	—
Texas Star Oil Co.	34	1	—	—	—	—	—	—	—	—	—
Thornhill Oil Company Inc.	26	1	—	—	—	—	—	—	—	—	—
Tooley Oil Company	10	2	—	—	—	—	—	—	—	—	—
Tosco Corporation	(X)	9	—	—	—	—	—	—	—	—	—
Total Petroleum, Inc.	1,847(NN)	22	—	—	—	—	—	—	—	—	—
Town Pump Inc. & Affiliates	65	3	—	—	—	—	—	—	—	—	—
Transit Oil Company	2	2	—	—	—	—	—	—	—	—	—
Trenton Oil Co., Inc.	50	1	—	—	—	—	—	—	—	49	1
Triton Incorporated	42	5	—	—	—	—	—	—	—	—	—
Thrifty Oil Co.	(X)	1	—	—	—	—	—	—	—	—	—
Truman Arnold Companies	65	6	—	—	—	—	—	—	—	—	—
Ultramar Petroleum Inc.	93	2	—	—	7	—	—	—	86	—	—
Union Oil Co. of California	10,365	42	—	—	—	—	—	2	2	2	29
United Marketing	285	3	—	—	—	—	—	—	144	—	124
United Refining Co.	291	3	—	—	—	—	—	—	145	—	129
United States Oil Co., Inc.	9	1	—	—	—	—	—	—	—	—	—
Vicksburg Refining Inc.	27(OO)	2	—	—	—	—	—	—	—	—	—
Wake Up Oil Co. Inc.	42	1	—	—	—	—	—	—	—	—	—
Warelubco Inc.	90	6	—	—	—	—	—	—	—	—	—
Warren Equities, Inc.	259	8	5	7	—	66	58	45	22	43	13
Wavaho Oil Co. Inc.	12	1	—	—	—	—	—	—	—	—	—
Webaco Oil Co. Inc.	10	1	—	—	—	—	—	—	10	—	—
Webb Oil Company	20	1	—	—	—	—	—	—	—	—	—
Webster Oil Company	25	3	—	—	—	—	—	—	—	—	—
Wesson Inc.	27	1	—	—	—	—	—	27	—	—	—
Western Marketing, Inc.	28	1	—	—	—	—	—	—	—	—	—
Wickland Oil Co.	85(RR)	3	—	—	—	—	—	—	—	—	—
York Oil Co., Inc.	9(SS)	1	—	—	—	—	—	—	—	—	—
Zarda Bros. Dairy, Inc.	7	2	—	—	—	—	—	—	—	—	—
Zephyr Inc.	55	2	—	—	—	—	—	—	—	—	—

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	West North Central						
			Minn.	Iowa	Mo.	N.D.	S.D.	Neb.	Kan.
Ada Resources	115	1	—	—	—	—	—	—	—
American Petrofina Inc.	4,385(A)	22	25	10	193	6	35	62	199
Amoco Oil Company	15,652(B)	36	610	386	534	291	284	186	246
Arkansas Valley Petro.	34	2	—	—	—	—	—	—	—
Armour Oil Co.	85	5	—	—	—	—	—	—	—
Ashland Oil Co.	1,910	15	83	15	4	1	5	—	—
Atlantic Richfield Co.	3,384(TT) (UU)	22	—	—	—	—	—	—	—
Barney Holland Oil Co.	71(C)	1	—	—	—	—	—	—	—
Beacon Oil Co.	275	3	—	—	—	—	—	—	—
Brennan Petroleum Co.	3	1	—	—	—	—	—	—	—
California Target Enterprizes Inc.	150(F)	1	—	—	—	—	—	—	—
Cardon Corporation	52	5	—	—	—	—	—	—	—
Cenex	1,067(G)	14	319	3	—	258	157	4	—
Charter Marketing Co.	437	9	—	—	—	—	—	—	—
Chevron Corporation	10,618(H)	38	—	—	—	—	—	—	—
Circle K Corporation	1,731(I)	22	—	—	(X)	—	—	—	(X)
Citgo Petroleum Corporation	3,599	31	14	—	2	—	—	—	—

(CC) Includes Whiting Oil, Stop In Food Stores.
(DD) Includes Scotland Oil Co. Inc., Dalton Oil Co. Inc., Dillon Service Co. Inc., Hay Oil Co. Inc.
(EE) Includes Dixxie Diesel Truck Stops.
(FF) Includes Aero Oil.
(GG) Includes Port Oil Corp.
(HH) Includes River Oil Co. of Jackson, Tenn.
(II) Includes Trail Oil Co.

South Atlantic									East North Central					East South Central			
Del.	Md.	D.C.	Va.	W.Va.	N.C.	S.C.	Ga.	Fla.	Ohio	Ind.	Ill.	Mich.	Wis.	Ky.	Tenn.	Ala.	Miss.
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	14	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	4	55	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	64	—
—	—	—	—	—	—	—	—	—	—	—	—	—	28	—	—	—	—
(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	(X)	—	(X)	(X)	(X)	(X)
—	25	4	16	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	84
54	141	24	72	54	150	24	—	37	571	247	428	465	—	143	36	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	9	—	45	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	5	9	—	—	—	—	—	—	—	14	—
—	—	—	7	1	23	32	44	112	—	—	—	—	—	11	37	22	10
56	267	11	697	62	935	435	589	773	—	191	470	—	194	270	532	680	381
—	—	—	—	—	—	—	5	9	—	—	—	—	—	—	—	12	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	26	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	3	5	3	511	28	3	19	5	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	1	—	—	—	1	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	5	—	10	9	18	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	1
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	7	—	337	171	631	260	604	708	513	336	400	612	433	133	505	828	397
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	17	—	—	—	—	—	—	—	—
—	—	—	9	—	—	—	—	—	17	42	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	25
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	8	—	3	62	—	—	—	1	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	12	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	20	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	9	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	55	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

West South Central				Mountain								Pacific				
Ark.	La.	Okla.	Texas	Mont.	Idaho	Wyo.	Colo.	N.M.	Ariz.	Utah	Nev.	Wash.	Ore.	Calif.	Alaska	Hawaii
—	—	—	115	—	—	—	—	—	—	—	—	—	—	—	—	—
203	121	249	1,374	—	—	—	—	164	—	—	—	—	—	—	—	—
—	521	—	148	—	108	124	236	—	—	27	—	—	—	—	—	—
—	—	33	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	1	—	2	42	1	39	—	—
—	—	—	—	15	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	32	6	42	290	205	1217	—	19
—	—	—	71	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	5	—	6	264	—	—
—	—	—	—	—	—	—	—	—	3	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	150	—	—
—	—	4	—	—	—	—	—	—	44	2	—	—	—	—	—	—
—	—	—	—	23	28	7	—	—	—	16	—	62	40	—	—	—
—	83	—	106	—	—	—	—	—	—	—	—	—	—	—	—	—
34	—	—	183	69	131	36	112	211	219	146	112	502	337	2,141	112	156
(X)	(X)	(X)	(X)	(X)	(X)	—	(X)	(X)	(X)	(X)	(X)	(X)	—	(X)	—	—
117	204	34	120	—	—	—	—	—	—	—	—	—	—	49	—	—

(JJ) Includes Serv-N-Save Inc.
(KK) Includes United States Oil Corp.
(LL) Includes Delmarva Oil Inc.
(MM) Includes Alabama Oil Co., Midsouth Oil Co.
(NN) Includes Huron Valley Oil Co.
(OO) Includes Dinkins Petroleum Inc.
(PP) Includes BP Oil Inc., Boron Oil Co., Truckstops of America.

Branded Retail Outlets (cont'd.)

Company	TOTAL BRANDED RETAIL OUTLETS	NUMBER OF STATES WHERE GASOLINE BRAND IS MARKETED†	West North Central						
			Minn.	Iowa	Mo.	N.D.	S.D.	Neb.	Kan.
Coast Oil Company	49(J)	1	—	—	—	—	—	—	—
Cook & Cooley Inc.	100	1	—	—	—	—	—	—	—
Crystal Petroleum Co.	15	1	—	—	—	—	—	—	—
Curtis Parker Oil Co. Inc.	46	1	—	—	—	—	—	—	—
Desert Oil Co.	5	1	—	—	—	—	—	—	—
Diamond Shamrock Refining & Marketing Co.	2,060(T)	24	—	—	9	—	—	21	41
Dickey Inc.	6	1	—	6	—	—	—	—	—
Exxon Co., USA	18,139(M)	38	—	—	—	66	7	1	—
Flying J Inc.	70	9	—	—	(X)	—	—	—	—
Franko Oil Co.	96	2	—	—	—	—	—	—	—
Gasco Gasoline, Inc.	79	1	—	—	—	—	—	—	—
Giant Ind., Inc.	10	3	—	—	—	—	—	—	—
Gull Ind., Inc.	100	2	—	—	—	—	—	—	—
Harris Enterprises, Inc.	40	2	—	—	—	—	—	—	—
Hawaiian Indep. Ref., Inc.	10(O)	1	—	—	—	—	—	—	—
Highway Oil, Inc.	216(P)	24	—	1	12	1	4	1	24
Hinkle Enterprises, Inc.	11	1	—	—	—	—	—	—	—
Horkey Oil Co.	29	1	—	—	—	—	—	—	—
Huck's Convenient Stores	110	5	—	—	4	—	—	—	—
Hunt Oil Co.	175	6	—	—	—	—	—	—	—
Jack Griffith Pet. Prod., Inc.	10	1	—	—	—	—	—	—	—
J.S. & J Service, Inc.	16(R)	2	—	—	—	—	—	—	—
Kaibab Pet. Co.	35	1	—	—	—	—	—	—	—
Kent Oil Co.	25	1	—	—	—	—	—	—	—
Kerr-McGee Refining Corp.	1,839(S)	22	51	144	103	10	36	123	150
Kittie Petroleum, Inc.	13	1	—	—	—	—	—	—	—
Kwik Shop, Inc.	110	3	—	28	—	—	—	30	52
Land O'Lakes, Inc.	387	8	94	133	—	7	—	68	3
Major Brands Dist.	(X)	5	—	—	—	—	—	—	—
MAPCO Petroleum Inc.	302	13	—	—	1	—	—	—	5
Martin Oil Marketing, Ltd.	72	9	1	—	—	—	—	—	—
Merchants Oil	55	1	—	—	—	—	—	—	—
Merritt Truax Inc.	83(Y)	2	—	—	—	—	—	—	—
Mid-Missouri Oil Co.	8	1	—	—	8	—	—	—	—
Milder Oil Co., Inc.	10	2	—	(X)	—	—	—	(X)	—
Mobil Oil Corp.	13,862	41	431	165	407	99	—	2	—
Murphy Oil USA, Inc.	591	14	61	—	—	—	—	—	—
Musket Corp.	119	4	—	—	3	—	—	—	24
National Convenience Stores	73(AA)	11	—	—	—	—	—	—	—
National Oil Co.	103	9	—	—	4	—	—	4	3
Newell Oil Co., Inc.	13	1	—	—	—	—	—	—	—
Pacer Oil Co.	20	2	—	—	—	—	—	—	—
Pacific Northern Oil Co.	36	1	—	—	—	—	—	—	—
Peavey Oil Co.	8	1	—	—	—	—	—	—	—
Pester Corp.	100	10	—	100	—	—	—	—	—
Phillips Petroleum Co.	9,705(FF)	34	412	409	710	37	111	260	326
Quiktrip Corp.	201	4	—	47	39	—	—	—	52
Racetrac Pet., Inc.	249	13	—	—	—	—	—	—	—
Republic Oil Corp.	4(EE)	1	—	—	—	—	—	—	—
Remote Services, Inc.	268	9	—	1	—	—	—	—	—
Robinson Oil Co., Inc.	22(II)	1	—	—	—	—	—	—	—
Ross Resources, Inc.	21	2	—	—	—	—	—	—	20
Sahara Oil Co., Inc.	22	1	—	—	—	—	—	—	—
Shaffer Oil Inc.	31	5	2	—	—	7	11	4	—
Self Service Oil Co.	16	4	—	1	5	—	—	—	—
Shay Oil Co. Inc.	17	1	—	—	—	—	—	—	—
Shell Oil Company	11,010	38	—	46	221	—	—	—	—
SSG Corporation	30	2	2	—	—	—	—	—	—
The Standard Oil Company (Ohio)	8,560(PP)	30	—	—	—	—	—	—	—
Sumrall Oil Services, Inc.	85	2	—	—	—	—	—	—	—
Sun Refining & Marketing Co.	6,425(QQ)	29	—	571	258	—	—	18	24
Sunny Service Stations Inc.	11	1	—	—	—	—	—	—	—
Tenneco Oil Company Processing & Marketing	423	15	—	—	—	—	—	—	—
Texaco Inc.	19,558	46	258	381	626	—	97	197	348
Texas Star Oil Co.	34	1	—	—	—	—	—	—	—
Tooley Oil Company	10	2	—	—	—	—	—	—	—
Total Petroleum, Inc.	1,847(NN)	22	64	124	371	3	31	78	284
Town Pump Inc. & Affiliates	65	3	—	—	—	—	—	—	—
Truman Arnold Companies	85	6	—	—	—	—	—	—	—
Union Oil Co. of California	10,365	42	308	76	9	2	9	3	1
Vicksburg Refining Inc.	27(OO)	2	—	—	—	—	—	—	—
Warelubco, Inc.	90	6	—	14	2	—	—	—	—
Western Marketing, Inc.	28	1	—	—	—	—	—	—	—
Wickland Oil Co.	85(RR)	3	—	—	—	—	—	—	—
Zarda Bros. Dairy, Inc.	7	2	—	—	1	—	—	—	7

(QQ) Includes Herr Gas & Oil Co., Mid-State Oil Co., Montour Auto Service Co. Inc., Mascot Petroleum Co., Stop-N-Go Foods Inc., King Kwik Minit Markets Inc.

(RR) Includes Regal Stations Inc.

(SS) Includes Easy Go Stores.

(TT) Includes Prestige Stations Inc.

(UU) In May 1985, Arco announced plans to withdraw from refining and marketing operations east of the Mississippi River and concentrate on a five-state western region.

West South Central				Mountain								Pacific				
Ark.	La.	Okla.	Texas	Mont.	Idaho	Wyo.	Colo.	N.M.	Ariz.	Utah	Nev.	Wash.	Ore.	Calif.	Alaska	Hawaii
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	100	—	—
—	—	—	15	—	—	—	—	—	—	—	—	—	—	—	—	—
—	46	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	5	—	—	—	—	—	—	—	—	—	—
34	27	123	1,450	—	4	15	134	96	—	47	3	3	—	17	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
670	875	118	2,831	287	62	31	133	174	316	32	39	304	167	1,086	—	—
—	—	—	—	(X)	(X)	(X)	—	—	(X)	(X)	(X)	(X)	(X)	(X)	—	—
—	—	—	—	—	—	—	—	—	—	—	—	14	82	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	79	—	—
—	—	—	—	—	—	—	1	4	5	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	75	25	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	(X)	(X)	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	10
—	—	—	12	—	—	4	3	—	—	—	—	—	—	—	—	—
—	—	11	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	29	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
10	15	10	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	10	—	—	—	—	—	—	—	—	—	—	—	—	—	—
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—	—	—	—	—	—	—	—	—	35	—	—	—	—	—	—	—
—	—	—	25	—	—	—	—	—	—	—	—	—	—	—	—	—
223	7	416	214	—	—	—	—	20	—	—	—	—	—	—	—	—
—	—	—	13	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	(X)	(X)	(X)	(X)	—	—	—	—	(X)	—	—	—	—
31	36	26	22	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	1	—	—	—	—	—	—	—	—	—	—	1	—	—
—	—	—	—	—	—	—	55	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	2	81	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
76	258	75	1,119	—	—	—	—	9	192	—	25	282	278	1,462	—	—
14	36	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
1	1	75	4	—	—	—	8	2	—	—	—	—	—	—	—	—
—	(X)	(X)	(X)	—	—	—	(X)	—	(X)	—	(X)	—	—	(X)	—	—
—	10	21	47	—	—	—	—	9	2	—	—	—	—	—	—	—
—	—	—	13	—	—	—	—	—	—	—	—	—	—	—	—	—
(X)	—	(X)	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	36	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	8	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
234	143	576	1,296	—	101	46	281	156	—	138	7	—	—	—	—	—
—	—	63	—	—	—	—	—	—	—	—	—	—	—	—	—	—
4	10	—	10	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	4	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	22	—	—
—	—	—	1	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	22	—	—	—	—	—	—	—
—	—	—	—	—	—	7	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	17	—	—	—	—	—	—	—
118	449	—	636	—	43	—	26	116	53	17	55	328	269	1,578	—	67
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
(X)	—	(X)	(X)	—	—	—	—	(X)	—	—	—	—	—	(X)	—	—
—	1	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
12	—	497	6	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	11	—	—	—
—	42	—	65	—	—	—	14	—	—	—	—	—	—	—	—	—
424	772	757	2,827	—	82	80	345	189	173	163	65	449	352	1,427	59	50
—	—	—	34	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	2	—	—	8	—	—
12	6	202	28	—	—	—	44	11	12	—	—	—	—	—	—	—
—	—	—	—	(X)	(X)	(X)	—	—	—	—	—	—	—	—	—	—
45	2	1	19	—	—	—	17	—	—	—	—	—	—	—	—	—
56	29	3	51	—	11	—	1	2	139	35	56	315	231	1,877	104	137
—	2	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	28	—	—	—	—	—	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	5	—	1	79	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

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Average Number of Employees

(As of Jan. 1, 1984)

	Mining	Manufacturing		Transportation		Wholesale	Retail	
	Oil and Gas Extraction	Petroleum Refining	Oils and Greases	Pipelines, Except Gas	Gas Distribution	Petroleum Products	Gasoline Stations	Total
Alabama	1,758	402	29	104	2,998	4,558	7,375	17,224
Alaska	7,535	160	0	1,143	289	523	1,205	10,855
Arizona	163	76	0	100	964	1,304	7,311	9,918
Arkansas	3,946	765	†	†	2,448	2,594	4,414	14,167
California	40,081	27,624	662	1,040	10,941	15,776	59,222	155,346
Colorado	26,448	600	32	107	2,397	3,022	8,456	41,062
Connecticut	177	124	77	15	1,302	2,622	9,068	13,385
Delaware	40	1,032	11	0	346	351	1,360	3,140
District of Columbia	0	123	0	0	704	285	1,087	2,199
Florida	1,062	64	123	57	2,253	6,821	28,240	38,620
Georgia	113	109	138	510	3,602	6,013	14,818	25,303
Hawaii	†	413	0	0	353	503	3,577	4,846
Idaho	149	0	0	†	466	1,603	2,100	4,318
Illinois	6,116	6,729	791	1,022	8,659	10,727	23,848	57,892
Indiana	934	3,026	227	469	3,035	3,917	14,009	25,617
Iowa	30	0	56	172	1,138	2,975	11,177	15,548
Kansas	15,565	3,140	308	1,884	4,575	2,680	7,253	35,405
Kentucky	3,409	3,574	54	159	3,155	3,010	8,891	22,252
Louisiana	79,200	12,400	†	1,300	7,000	5,800	8,400	114,100
Maine	14	0	0	†	†	1,216	2,519	3,749
Maryland	0	0	229	0	1,266	3,530	12,815	17,840
Massachusetts	68	79	320	8	4,796	3,521	13,691	22,483
Michigan	4,117	1,998	436	217	8,096	5,040	19,981	39,887
Minnesota	†	†	†	196	2,457	2,677	14,510	19,840
Mississippi	8,100	1,660	120	151	2,170	3,530	4,670	20,401
Missouri	165	†	377	252	5,010	6,827	14,282	26,913
Montana	3,760	1,026	0	92	117	1,529	2,406	8,930
Nebraska	223	15	154	97	3,601	1,758	6,078	11,926
Nevada	313	38	0	20	555	402	3,332	4,660
New Hampshire	1	0	3	3	315	450	2,350	3,122
New Jersey	110	8,300	1,020	165	2,054	4,034	19,205	34,888
New Mexico	12,988	971	22	301	3,771	1,774	4,029	23,856
New York	2,680	11,145	373	126	7,083	11,002	28,229	60,638
North Carolina	13	0	175	116	2,427	5,087	9,193	17,011
North Dakota	5,387	240	0	172	665	2,377	2,019	10,860
Ohio	11,283	5,794	624	673	7,715	5,996	27,289	59,374
Oklahoma	74,870	7,648	290	2,454	5,773	7,124	6,373	104,532
Oregon	82	†	†	†	1,391	2,173	7,292	10,938
Pennsylvania	4,868	11,953	1,300	730	8,702	10,968	26,472	64,993
Rhode Island	28	0	†	0	848	572	2,313	3,761
South Carolina	14	†	†	†	718	3,411	6,904	11,047
South Dakota	124	3	0	62	130	1,426	2,490	4,235
Tennessee	763	318	53	45	1,744	4,558	12,084	19,565
Texas	252,408	40,931	913	5,245	29,375	25,589	34,788	389,249
Utah	4,493	863	†	83	2,992	1,945	4,065	14,441
Vermont	†	0	†	0	124	282	1,656	2,062
Virginia	200	200	†	100	2,500	7,400	13,700	24,100
Washington	214	1,554	61	84	1,551	2,972	9,279	15,715
West Virginia	5,866	482	64	133	5,454	2,065	3,731	17,795
Wisconsin	15	†	0	149	2,917	3,713	13,234	20,028
Wyoming	196,551	15,972	12	4,432	11,900	13,942	33,643	276,452
TOTAL	776,444	171,551	9,054	24,188	184,844	223,974	586,433	1,976,488

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†Unavailable

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State, 1984."

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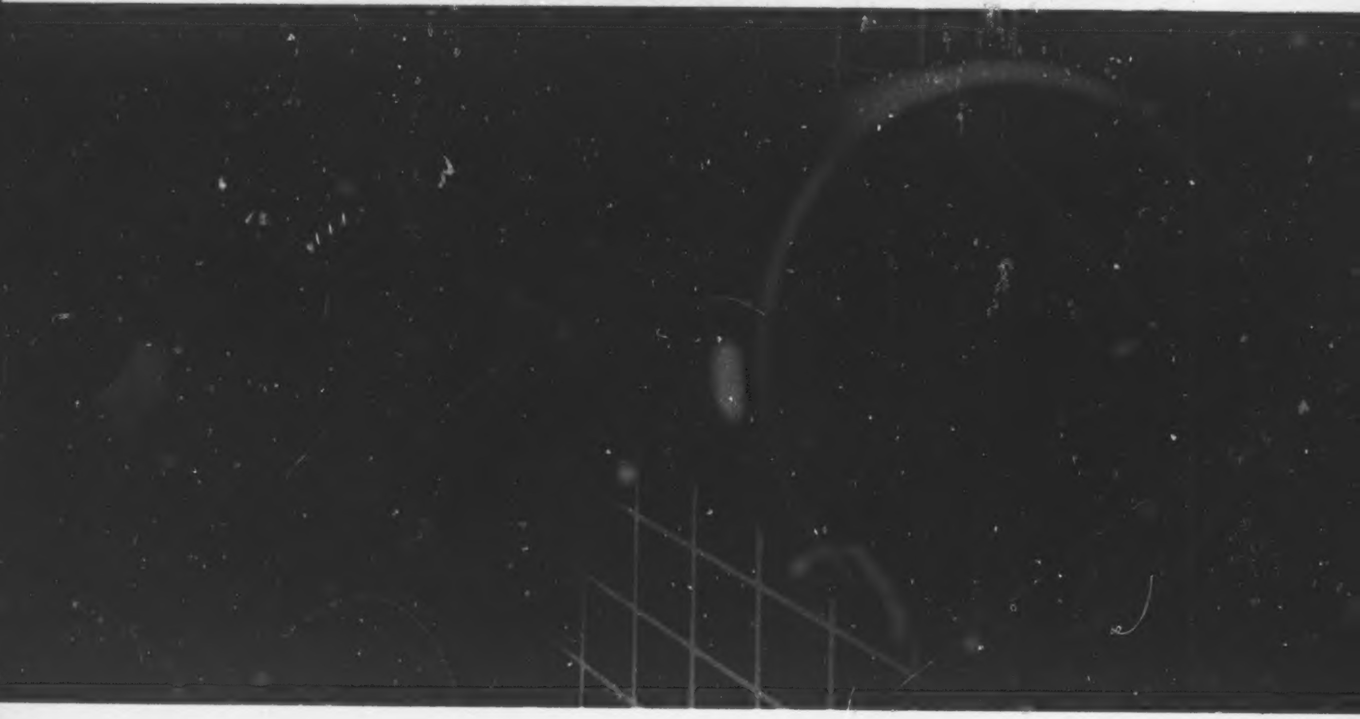

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How Distillates Were Used in 1983

(Add 000 bbl.)

Use	1983	1982	% Change	% Share of Total Distillates Use in 1983	% Share of Total Distillates Use in 1982
Residential	171,783	180,760	(5.0%)	17.5%	18.5%
Commercial	72,809	75,699	(3.8)	7.4	7.8
Industrial	69,332	71,340	(2.8)	7.1	7.3
Farm	66,697	68,453	(2.6)	6.8	7.0
Sub-total (a)	380,621	396,252	(3.9)	38.8	40.6
Oil Company	29,957	29,482	1.6	3.1	3.0
Elec. Utils.	11,744	12,134	(3.2)	1.2	1.2
Railroads	91,681	93,150	(1.2)	9.3	9.6
Vessels	33,785	33,855	(0.2)	3.4	3.5
Highway diesel	362,276	338,006	7.2	36.9	34.7
Military	15,924	15,201	(4.8)	1.6	1.6
Off-Highway diesel	36,737	37,118	(1.0)	3.7	3.8
All other	19,201	19,639	(2.2)	2.0	2.0
U.S. Total	**981,927**	**974,864**	**0.7**	—	—

(a) For a general consideration, the sum of the residential, commercial, industrial and farm is roughly comparable to the old "heating" category, which was discontinued in 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1983, Petroleum Supply Annual, Energy Information Administration, June 1984.

How Residual Was Used in 1983

(Add 000 bbl.)

Use	1983	1982	% Change	% Share of Total Residual Use in 1983	% Share of Total Residual Use in 1982
Commercial	46,763	65,781	(28.9%)	9.0%	10.5%
Industrial	89,573	122,619	(27.0)	17.3	19.6
Sub-total (a)	136,336	188,400	(27.6)	26.3	30.1
Oil Company	32,820	45,319	(27.6)	6.3	7.2
Elec. Utils.	204,238	227,419	(10.2)	39.4	36.3
Railroad	140	170	(17.6)	—	—
Vessels	136,290	152, 586	(10.7)	26.3	24.4
Military	5,411	7,829	(30.9)	1.0	1.2
All other	3,389	4,784	(29.2)	0.7	0.8
U.S. total	**518,604**	**626,510**	**(17.2)**	—	—

(a) Separate space-heating category no longer exists. The sum of the commercial and industrial categories roughly approximates the heating category prior to 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1983, Petroleum Supply Annual, Energy Information Administration, June 1984.

How Kerosine Was Used in 1983

(Add 000 bbl.)

Use	1983	1982	% Change	% Share of Total Kerosine Use in 1983	% Share of Total Kerosine Use in 1982
Residential	15,205	16,769	(9.3%)	32.8%	35.7%
Commercial	5,294	5,347	(1.0)	11.4	11.4
Industrial	6,703	6,480	3.4	14.4	13.8
Sub-total (a)	27,202	28,596	(4.9)	58.7	60.1
Farm	1,305	1,346	(3.0)	2.8	2.3
All other	17,845	17,016	4.9	38.5	36.2
U.S. Total	**46,352**	**46,963**	**(1.3)**	—	—

(a) Separate heating category no longer exists. The sum of the residential, commercial and industrial roughly approximates the heating category prior to 1979.
Source: Deliveries of Fuel Oil and Kerosine in 1983, Petroleum Supply Annual, Energy Information Administration, June 1984.

How New Homes Are Heated

Fuel Oil hung on grimly in the Northeast in 1983 but slipped badly in the surprise gains it made in the North Central in 1982. Fuel oil got 17% of the new home construction in New England, down 1% from the preceding year. It got literally nothing in the North Central, however, where it had scored a 3% boost in 1982. Its nationwide growth was a small 1%.

Region	New Homes Completed (Add 000)	Share of New Homes by Fuels and percentages: Gas	Electric	Oil	Other
Northeast	106	38%	36%	17%	9%
North Central	142	65	24	—	9
South	476	34	62	—	3
West	200	53	40	—	8
Total 1983	**924**	**43%**	**49%**	**1%**	**6%**
Total 1982	**632**	**40%**	**50%**	**3%**	**8%**

Source: U.S. Department of Commerce, Construction Reports 25-83-13, July 1984.

Gas: Who Uses It for Heat

Gas added another half-million-plus customers in 1983, but the rate of increase declined again for the third consecutive year. In the total of new customers the net additions were down 10.4%. In new homes, however, gas bounded up 18%. Conversions were another story. They were down 46.3%.

Region	% of Gas-Heated Homes to Total Gas-Using Homes	Consumers Added in 1983 (Add 000): New Homes	Existing Homes	Total Added
New England	65.8%	8.2	15.0	23.2
Mid-Atlantic	63.3	29.9	49.5	79.4
East North Central	93.9	59.1	31.9	91.0
West North Central	96.9	29.9	4.8	34.7
South Atlantic	90.5	70.7	15.6	86.3
East South Atlantic	97.0	15.9	2.0	17.9
West South Atlantic	98.0	76.0	1.4	77.4
Mountain	98.5	55.3	1.6	56.9
Pacific	94.6	101.4	9.6	111.0
Total	**88.7**	**446.4**	**131.4**	**557.8**
% Change '83 vs. '82		+ 18.3%	− 46.3%	− 10.4%

Source: American Gas Assn., Home Heating Survey, 1983.

Gas Heat Equipment Shipments

Everything came up roses for gas-fired equipment sales in 1984 as 1983's upswing continued unabated, according to Gas Appliance Manufacturers Assn. Furnaces were up 11% and boilers 22%. Water heaters rose 10%.

Class and Type of Equipment	1984	1983	% Change
Central Heating:			
Furnaces	1,849,200	1,661,765	11.3%
Boilers	179,870	147,710	21.8
Space Heating:			
Wall Furnaces Vented	179,310	168,310	6.5
RV Systems	190,470	176,103	8.2
Water Heaters:			
Gas	3,502,053	3,172,067	10.4
Electric	3,480,845	3,131,017	11.2
Oil (a)	30,000	29,000	3.4

(a) Estimate provided by fuel oil industry source for comparison.
Source: Gas Appliance Manufacturers Assn.

Distillate Sales in 1983 . . .

(Add 000 bbl.)

Destination	Residential 1983	Residential 1982	Commercial 1983	Commercial 1982	Industrial 1983	Industrial 1982	Oil Company 1983	Oil Company 1982
PAD District 1								
New England States								
Connecticut	11,676	12,277	2,837	2,983	1,039	1,092	30	32
Maine	4,713	4,956	1,351	1,421	422	444	12	13
Massachusetts	17,251	18,139	5,254	5,525	1,492	1,569	36	38
New Hampshire	3,074	3,232	564	593	247	260	8	8
Rhode Island	2,352	2,473	413	434	185	194	11	11
Vermont	1,331	1,399	483	508	127	134	5	5
Central Atlantic States								
Delaware	853	897	395	415	91	96	37	39
District of Columbia	485	510	429	451	5	5	2	2
Maryland	5,881	6,184	1,688	1,775	1,147	1,206	53	56
New Jersey	18,401	19,349	6,706	7,051	6,074	6,387	115	121
New York	30,198	31,753	12,970	13,638	3,629	3,816	277	291
Pennsylvania	19,746	20,763	4,503	4,735	4,784	5,030	269	283
Lower Atlantic States								
Florida	690	726	620	652	1,275	1,341	207	218
Georgia	155	163	993	1,044	864	908	142	149
North Carolina	4,683	4,924	845	888	1,089	1,145	45	47
South Carolina	1,080	1,136	385	405	462	486	58	61
Virginia	4,803	5,050	1,414	1,487	1,168	1,228	1,391	1,463
West Virginia	824	866	288	303	1,490	1,567	160	168
Total	**128,196**	**134,797**	**42,138**	**44,308**	**25,590**	**26,908**	**2,858**	**3,005**
PAD District 2								
Illinois	2,513	2,675	2,949	3,139	2,681	2,854	516	549
Indiana	3,978	4,234	1,358	1,445	2,201	2,343	145	155
Iowa	1,988	2,116	610	649	567	603	21	22
Kansas	163	174	137	146	841	895	613	653
Kentucky	610	649	462	492	2,749	2,926	160	170
Michigan	5,948	6,331	2,008	2,137	1,368	1,456	99	105
Minnesota	5,848	6,224	931	991	769	819	87	93
Missouri	1,060	1,128	987	1,051	783	833	82	87
Nebraska	345	367	281	299	200	213	28	30
North Dakota	860	915	198	211	271	288	440	468
Ohio	4,229	4,501	1,982	2,110	3,345	3,561	294	313
Oklahoma	1	1	148	157	1,057	1,125	1,551	1,651
South Dakota	823	876	268	285	101	107	16	17
Tennessee	380	404	1,050	1,118	1,249	1,329	88	94
Wisconsin	7,128	7,587	1,205	1,282	616	656	36	38
Total	**35,874**	**38,182**	**14,574**	**15,512**	**18,798**	**20,008**	**4,176**	**4,446**
PAD District 3								
Alabama	57	55	249	238	1,761	1,686	76	73
Arkansas	15	14	145	139	510	488	103	99
Louisiana	88	84	363	348	3,668	3,512	7,244	6,936
Mississippi	0	0	119	114	692	663	1,213	1,161
New Mexico	25	24	585	560	644	617	229	219
Texas	30	29	5,112	4,894	4,312	4,128	8,439	8,080
Total	**215**	**206**	**6,573**	**6,293**	**11,587**	**11,094**	**17,304**	**16,568**
PAD District 4								
Colorado	61	58	159	151	680	644	105	100
Idaho	292	277	496	470	448	425	3	3
Montana	372	353	194	184	286	271	107	101
Utah	132	125	404	383	809	767	286	271
Wyoming	32	30	371	362	1,672	1,585	3,173	3,008
Total	**889**	**843**	**1,624**	**1,540**	**3,895**	**3,692**	**3,674**	**3,483**
PAD District 5								
Alaska	1,107	1,128	473	482	713	726	5	5
Arizona	0	0	22	23	1,031	1,050	1	1
California	71	72	4,330	4,410	4,706	4,794	1,665	1,696
Hawaii	0	0	54	55	82	83	215	219
Nevada	155	158	76	77	230	234	5	5
Oregon	2,078	2,117	985	1,003	1,373	1,399	25	25
Washington	3,198	3,257	1,960	1,996	1,327	1,352	29	30
Total	**6,609**	**6,732**	**7,900**	**8,046**	**9,462**	**9,638**	**1,945**	**1,981**
U.S. Total	**171,783**	**180,760**	**72,809**	**75,699**	**69,332**	**71,340**	**29,957**	**29,482**

. . . By Categories and Uses

(Add 000 bbl.)

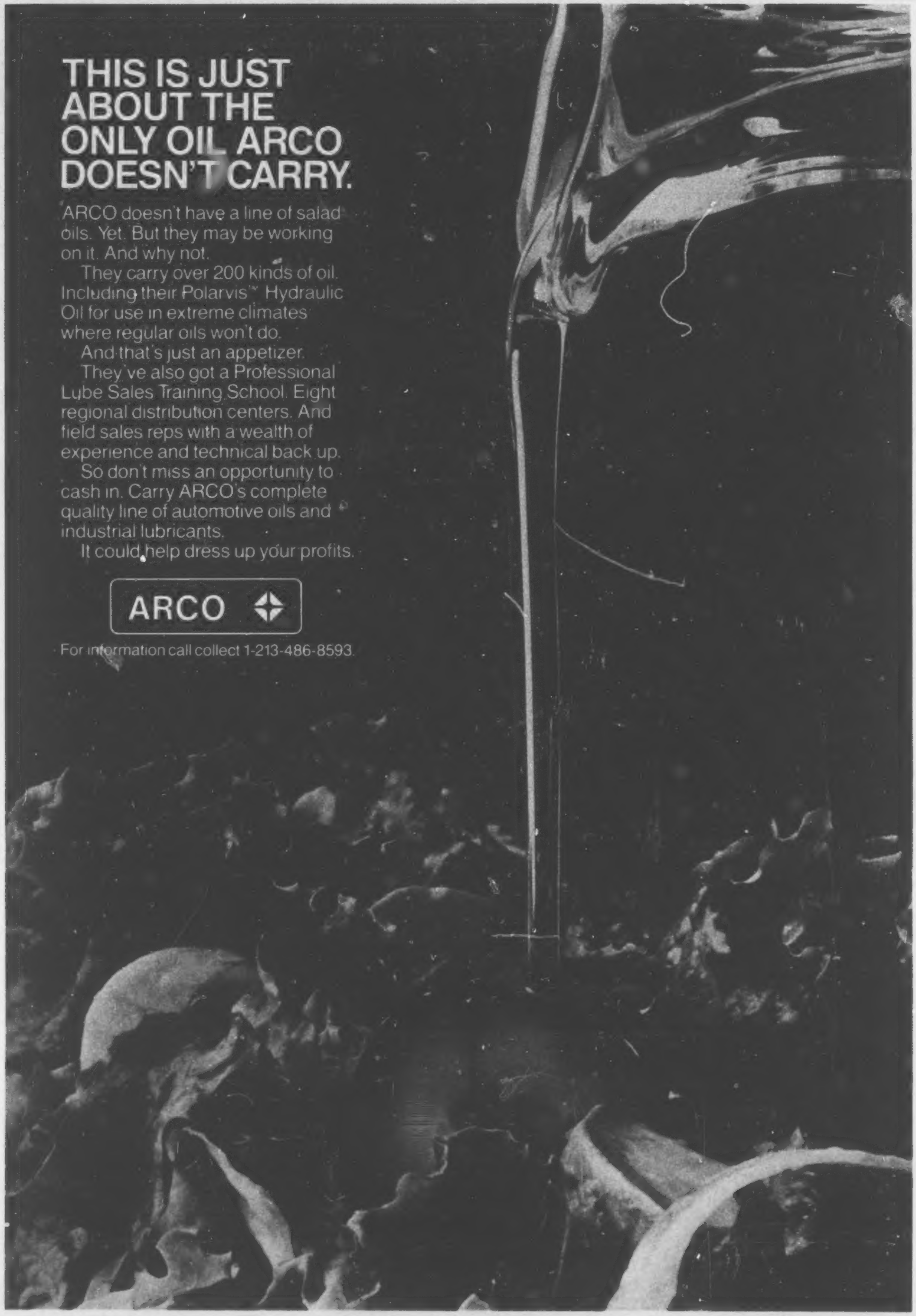
Destination	Electric Utility		Farm		Military		Railroad		Vessel Bunkering	
	1983	1982	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1										
New England States										
Connecticut	64	17	81	85	1,029	982	6	6	16	17
Maine	58	54	108	114	60	57	125	131	84	88
Massachusetts	336	672	65	68	688	657	229	241	168	177
New Hampshire	21	12	39	41	1	1	1	1	10	11
Rhode Island	19	18	10	11	4	4	20	21	30	31
Vermont	21	16	88	93	0	0	6	6	5	5
Central Atlantic States										
Delaware	123	74	121	127	0	0	26	27	5	5
District of Columbia	574	247	0	0	326	311	68	72	0	0
Maryland	762	589	332	349	315	301	462	486	473	497
New Jersey	735	283	122	128	109	104	492	517	1,640	1,724
New York	655	954	925	973	244	233	882	928	595	626
Pennsylvania	2,095	1,410	941	989	88	84	1,447	1,522	294	309
Lower Atlantic States										
Florida	508	367	555	583	82	78	1,581	1,662	2,820	2,965
Georgia	9	219	693	729	91	87	2,015	2,119	552	580
North Carolina	394	277	1,452	1,527	43	41	937	985	95	100
South Carolina	102	145	534	561	56	54	420	442	88	93
Virginia	181	291	428	450	274	261	2,036	2,141	557	586
West Virginia	399	455	103	108	0	0	1,147	1,206	150	158
Total	**7,056**	**6,100**	**6,597**	**6,936**	**3,410**	**3,255**	**11,900**	**12,513**	**7,582**	**7,972**
PAD District 2										
Illinois	396	386	3,057	3,254	26	25	4,464	4,751	88	94
Indiana	182	504	2,281	2,428	28	27	3,215	3,422	95	101
Iowa	110	63	3,246	3,455	40	38	2,052	2,184	33	35
Kansas	92	228	1,902	2,024	19	18	3,951	4,205	0	0
Kentucky	192	270	632	673	21	20	2,501	2,662	2,569	2,735
Michigan	417	317	2,127	2,264	148	141	1,148	1,222	49	52
Minnesota	21	8	3,697	3,935	21	20	1,636	1,742	225	239
Missouri	190	116	3,650	3,885	30	29	2,536	2,699	649	691
Nebraska	47	28	2,714	2,888	9	9	963	1,025	0	0
North Dakota	113	78	1,682	1,790	181	172	869	925	47	50
Ohio	259	474	1,598	1,701	11	10	4,789	5,097	31	33
Oklahoma	51	59	628	668	0	0	1,356	1,443	0	0
South Dakota	30	92	1,354	1,441	27	26	199	212	0	0
Tennessee	143	184	725	772	8	8	2,627	2,796	1,313	1,348
Wisconsin	128	223	1,975	2,101	13	12	912	971	83	88
Total	**2,371**	**3,030**	**31,268**	**33,280**	**582**	**555**	**33,218**	**35,356**	**5,182**	**5,466**
PAD District 3										
Alabama	71	33	839	803	9	9	3,369	3,225	1,297	1,242
Arkansas	0	217	3,121	2,988	6	6	2,873	2,751	152	146
Louisiana	130	288	1,902	1,821	238	227	2,756	2,639	4,934	4,724
Mississippi	0	44	1,734	1,660	5	5	919	880	686	657
New Mexico	29	112	248	238	17	16	2,189	2,096	0	0
Texas	623	685	6,595	6,315	3,503	3,344	13,404	12,834	8,713	8,342
Total	**853**	**1,379**	**14,439**	**13,825**	**3,778**	**3,607**	**25,510**	**24,425**	**15,782**	**15,111**
PAD District 4										
Colorado	1	68	1,339	1,269	52	50	1,985	1,882	0	0
Idaho	0	0	758	719	20	19	601	570	0	0
Montana	0	0	885	839	2	2	1,479	1,402	0	0
Utah	55	27	248	236	2	2	1,307	1,239	0	0
Wyoming	112	8	286	271	1	1	2,964	2,810	0	0
Total	**168**	**103**	**3,516**	**3,333**	**77**	**74**	**8,336**	**7,903**	**0**	**0**
PAD District 5										
Alaska	599	582	14	14	230	220	35	36	839	854
Arizona	0	75	606	617	12	11	1,210	1,232	0	0
California	0	190	8,142	8,283	5,481	5,232	7,008	7,138	1,826	1,960
Hawaii	636	619	400	408	2,202	2,102	15	15	64	65
Nevada	40	20	78	79	15	14	718	731	0	0
Oregon	18	16	584	595	22	21	2,568	2,616	959	977
Washington	3	11	1,053	1,073	115	110	1,163	1,186	1,551	1,580
Total	**1,296**	**1,522**	**10,877**	**11,079**	**8,077**	**7,710**	**12,717**	**12,953**	**5,239**	**5,436**
U.S. Total	**11,744**	**12,134**	**66,697**	**68,463**	**15,924**	**15,201**	**91,681**	**93,150**	**33,785**	**33,985**

Distillate Sales in 1983 (Continued)

(Add 000 bbl.)

Destination	On-Highway		Off-Highway		All Other		Total	
	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1								
New England States								
Connecticut	3,203	2,698	239	251	66	69	20,286	20,509
Maine	1,731	1,564	231	243	99	104	8,994	9,189
Massachusetts	5,378	4,745	294	309	117	123	31,308	32,263
New Hampshire	800	744	162	170	10	11	4,937	5,084
Rhode Island	721	679	36	38	67	70	3,868	3,984
Vermont	722	352	164	173	15	16	2,967	2,707
Central Atlantic States								
Delaware	1,024	921	127	134	17	18	2,819	2,753
District of Columbia	475	436	9	9	164	172	2,537	2,215
Maryland	4,610	4,023	310	326	386	406	16,419	16,198
New Jersey	8,717	8,093	494	519	1,208	1,270	44,813	45,546
New York	8,948	8,353	589	619	403	424	60,315	62,608
Pennsylvania	16,048	15,296	2,031	2,136	483	508	52,729	53,065
Lower Atlantic States								
Florida	19,681	13,098	295	310	478	503	28,792	22,503
Georgia	13,321	11,801	182	191	378	397	19,395	18,387
North Carolina	10,869	9,789	281	296	157	165	20,890	20,184
South Carolina	6,213	5,682	187	197	190	200	9,775	9,462
Virginia	8,686	8,286	544	572	122	128	21,604	21,943
West Virginia	2,549	2,381	236	248	189	199	7,535	7,659
Total	**113,696**	**98,941**	**6,411**	**6,741**	**4,549**	**4,783**	**359,983**	**356,254**
PAD District 2								
Illinois	13,344	13,744	791	842	195	208	31,020	32,521
Indiana	14,133	13,821	369	393	38	40	28,023	28,913
Iowa	6,800	6,525	450	479	40	43	15,957	16,212
Kansas	5,266	5,100	253	269	99	105	13,336	13,817
Kentucky	6,361	5,747	793	844	300	319	17,350	17,507
Michigan	8,803	8,181	340	362	236	251	22,691	22,819
Minnesota	6,753	6,341	402	428	38	40	20,428	20,880
Missouri	9,199	9,004	1,126	1,198	16	17	20,308	20,738
Nebraska	4,111	4,086	210	224	7	7	8,915	9,176
North Dakota	2,098	2,084	243	259	18	19	7,020	7,209
Ohio	17,659	17,092	3,085	3,283	1,950	2,075	39,232	40,250
Oklahoma	8,307	8,251	762	811	367	391	14,228	14,557
South Dakota	1,986	1,900	96	102	69	73	4,965	5,131
Tennessee	10,587	9,505	302	321	783	835	19,255	18,764
Wisconsin	7,711	7,072	433	461	42	45	20,282	20,537
Total	**123,118**	**118,453**	**9,655**	**10,276**	**4,198**	**4,468**	**283,014**	**289,033**
PAD District 3								
Alabama	7,450	6,758	734	703	638	611	16,550	15,436
Arkansas	5,820	5,512	916	877	103	99	13,764	13,336
Louisiana	7,880	7,510	2,672	2,559	219	210	32,094	30,858
Mississippi	5,626	5,257	724	693	747	715	12,465	11,849
New Mexico	4,020	3,512	511	489	74	71	8,571	7,954
Texas	32,407	32,692	7,503	7,184	1,727	1,653	92,368	90,180
Total	**63,203**	**61,241**	**13,060**	**12,505**	**3,508**	**3,359**	**175,812**	**169,613**
PAD District 4								
Colorado	4,597	4,211	628	595	110	104	9,717	9,132
Idaho	1,499	1,718	246	233	65	62	4,428	4,496
Montana	2,425	2,473	161	153	38	36	5,949	5,814
Utah	2,842	2,550	565	536	306	290	6,756	6,425
Wyoming	2,542	2,253	610	578	126	119	11,889	11,015
Total	**13,705**	**13,205**	**2,210**	**2,095**	**645**	**611**	**38,739**	**36,884**
PAD District 5								
Alaska	1,174	596	416	424	1,235	1,258	6,840	6,335
Arizona	4,816	4,581	271	276	232	236	8,201	8,102
California	28,804	27,679	2,971	3,026	2,893	2,947	67,897	67,337
Hawaii	515	415	151	154	428	436	4,762	4,570
Nevada	2,043	1,977	174	177	45	46	3,579	3,518
Oregon	5,469	5,339	337	343	559	569	14,977	15,020
Washington	5,733	5,579	1,081	1,101	909	926	18,122	18,200
Total	**48,554**	**46,166**	**5,401**	**5,501**	**6,301**	**6,418**	**124,378**	**123,081**
U.S. Total	**362,276**	**338,006**	**36,737**	**37,118**	**19,201**	**19,639**	**981,927**	**974,864**

Source: Energy Information Administration, Petroleum Supply Annual, June 1984.



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Kerosine Sales in 1983

(Add 000 bbl.)

Destination	Residential		Commercial		Industrial		Farm		All Other		Total	
	1983	1982	1983	1982	1983	1982	1983	1982	1983	1982	1983	1982
PAD District 1												
New England States												
Connecticut	239	263	1	1	2	2	0	0	105	115	347	381
Maine	247	272	20	22	4	4	3	4	13	14	287	316
Massachusetts	464	510	25	28	12	13	1	1	196	216	698	768
New Hampshire	213	234	7	8	0	0	1	1	5	5	226	248
Rhode Island	112	123	2	2	0	0	0	0	0	0	114	125
Vermont	140	154	24	26	0	0	4	5	2	2	170	187
Central Atlantic States												
Delaware	295	324	11	12	1	1	2	2	1	1	310	340
District of Columbia	4	4	1	1	1	1	0	0	0	0	6	6
Maryland	604	664	80	88	17	19	8	9	23	25	732	805
New Jersey	321	353	87	96	127	140	0	0	743	817	1,278	1,406
New York	1,670	1,836	181	199	119	131	21	23	338	372	2,329	2,561
Pennsylvania	1,995	2,194	214	236	301	331	23	25	133	146	2,665	2,932
Lower Atlantic States												
Florida	206	227	201	221	4	4	11	12	511	562	933	1,026
Georgia	56	62	130	143	2	2	11	12	85	94	284	313
North Carolina	1,841	2,025	30	33	33	36	159	175	57	63	2,120	2,332
South Carolina	478	526	23	25	10	11	13	14	26	29	550	605
Virginia	953	1,048	31	34	63	70	48	53	57	63	1,153	1,268
West Virginia	284	312	15	16	73	81	1	1	30	33	403	443
Total	**10,122**	**11,131**	**1,083**	**1,191**	**769**	**846**	**306**	**337**	**2,325**	**2,557**	**14,605**	**16,062**
PAD District 2												
Illinois	281	335	6	7	42	50	15	18	24	29	368	439
Indiana	288	343	15	18	100	119	51	61	42	50	496	591
Iowa	251	299	30	36	12	14	51	61	34	40	378	450
Kansas	15	18	6	7	21	25	6	7	142	169	190	226
Kentucky	442	527	70	83	100	119	40	47	305	364	957	1,140
Michigan	469	559	15	18	60	72	15	18	64	76	623	743
Minnesota	160	191	3	4	0	0	27	32	3	4	193	231
Missouri	103	123	490	584	9	11	33	40	18	22	653	780
Nebraska	24	29	12	14	12	14	27	32	3	4	78	93
North Dakota	18	22	3	4	0	0	0	0	0	0	21	26
Ohio	765	912	51	61	159	191	40	47	1,134	1,352	2,149	2,563
Oklahoma	12	14	203	242	42	50	15	18	115	137	387	461
South Dakota	18	22	9	11	0	0	3	4	0	0	30	37
Tennessee	454	541	112	133	12	14	0	0	345	411	923	1,099
Wisconsin	66	79	109	130	21	25	3	4	3	4	202	242
Total	**3,366**	**4,014**	**1,134**	**1,352**	**590**	**704**	**326**	**389**	**2,232**	**2,662**	**7,648**	**9,124**
PAD District 3												
Alabama	607	534	376	331	232	204	28	25	723	636	1,966	1,730
Arkansas	58	51	86	76	232	204	28	25	174	153	578	509
Louisiana	86	76	376	331	1,707	1,501	319	280	4,050	3,562	6,538	5,750
Mississippi	58	51	145	127	116	102	28	25	28	25	375	330
New Mexico	203	178	174	153	86	76	0	0	202	178	665	585
Texas	405	356	1,476	1,298	1,620	1,425	175	153	7,840	6,895	11,516	10,127
Total	**1,417**	**1,246**	**2,633**	**2,316**	**3,993**	**3,512**	**578**	**508**	**13,017**	**11,449**	**21,638**	**19,031**
PAD District 4												
Colorado	113	170	16	23	5	8	31	46	10	15	175	262
Idaho	0	0	5	8	10	15	0	0	5	8	20	31
Montana	0	0	0	0	0	0	0	0	0	0	0	0
Utah	31	46	31	46	16	23	0	0	51	77	129	192
Wyoming	0	0	10	15	5	8	0	0	78	116	93	139
Total	**144**	**216**	**62**	**92**	**36**	**54**	**31**	**46**	**144**	**216**	**417**	**627**
PAD District 5												
Alaska	0	0	23	24	1,176	1,220	0	0	17	18	1,216	1,262
Arizona	0	0	12	12	0	0	0	0	6	6	18	18
California	17	18	312	324	64	66	58	60	64	66	515	534
Hawaii	0	0	0	0	0	0	0	0	0	0	0	0
Nevada	12	12	6	6	0	0	0	0	0	0	18	18
Oregon	58	60	12	12	0	0	6	6	17	18	93	96
Washington	69	72	17	18	75	78	0	0	23	24	184	192
Total	**156**	**162**	**382**	**396**	**1,315**	**1,364**	**64**	**66**	**127**	**132**	**2,044**	**2,121**
U.S. Total	**15,205**	**16,769**	**5,294**	**5,347**	**6,703**	**6,480**	**1,305**	**1,346**	**17,845**	**17,016**	**46,352**	**46,963**

Source: Energy Information Administration, Petroleum Supply Annual, June 1984.

Precision Engineered
for the Petroleum Industries

These Centrifugal Pumps are designed primarily for pumping petroleum products, related derivatives, petro-chemicals and solvents. In no way are they adaptations of pumps originally built for handling water or other non-petroleum liquids. Thus these models incorporate design features of paramount value for liquid hydrocarbon service.

All models are available both as straight centrifugals or in the exclusive Roto-Prime self-priming pump design in sizes 3" x 2", 4" x 3", 6" x 4" and 6" x 5".

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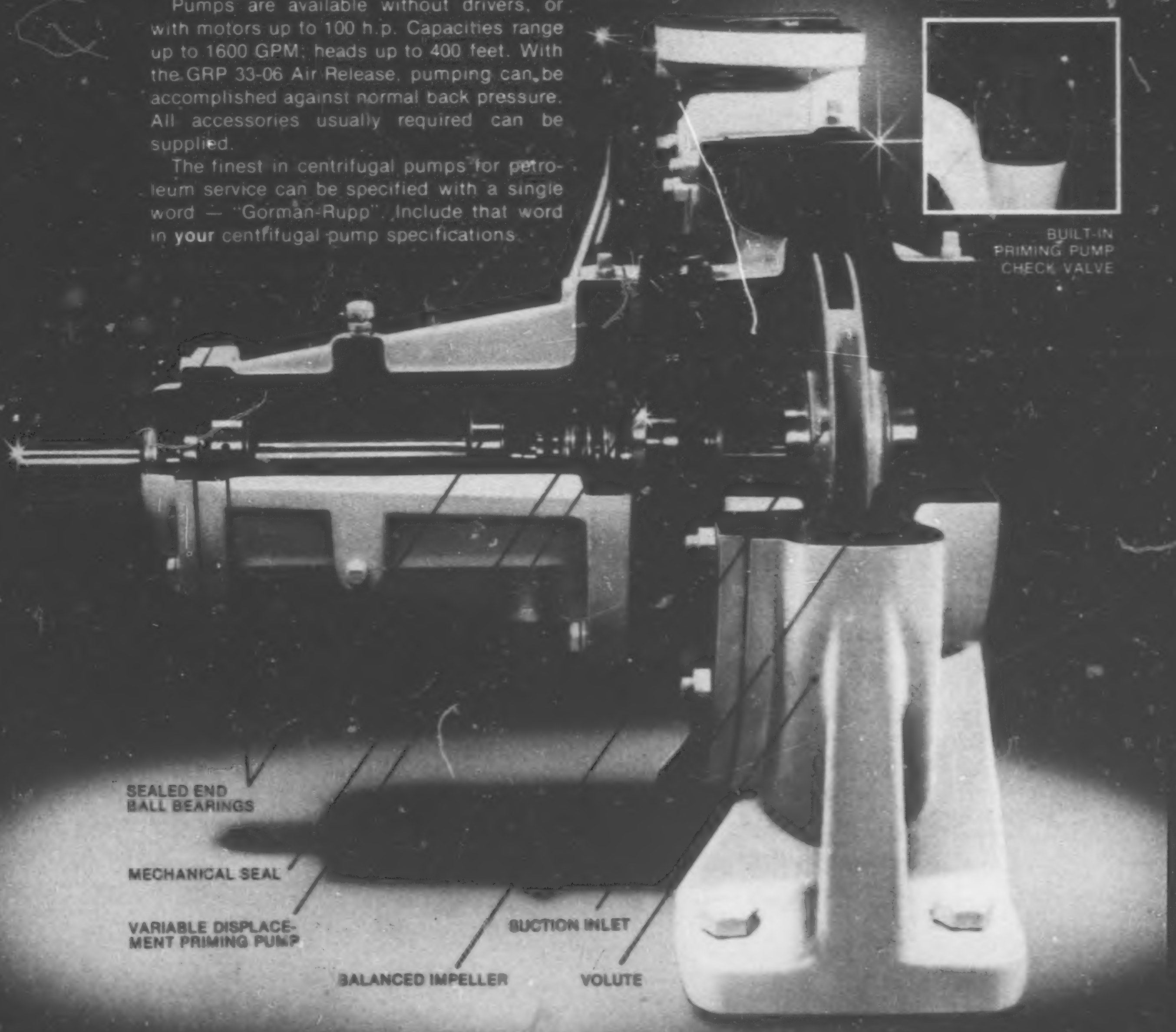
All centrifugals have rugged cast iron or cast steel housings, heavy-duty SAE 1045 steel shafts, viton fitted mechanical shaft seals and balanced impellers with bronze wear rings.

Pumps are available without drivers, or with motors up to 100 h.p. Capacities range up to 1600 GPM; heads up to 400 feet. With the GRP 33-06 Air Release, pumping can be accomplished against normal back pressure. All accessories usually required can be supplied.

The finest in centrifugal pumps for petroleum service can be specified with a single word — "Gorman-Rupp". Include that word in **your** centrifugal pump specifications.



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GR-P-178

Residual Fuel Oil Sales in 1983 . . .

(Add 000 bbl.)

	Commercial		Industrial		Oil Company		Electric Utility		Military	
Destination	**1983**	**1982**	**1983**	**1982**	**1983**	**1982**	**1983**	**1982**	**1983**	**1982**
PAD District 1										
New England States										
Connecticut	575	790	2,243	3,082	28	39	19,351	17,282	0	0
Maine	484	665	8,325	11,440	0	0	3,298	3,034	22	32
Massachusetts	3,192	4,386	3,751	5,154	1	2	26,309	31,130	669	968
New Hampshire	473	650	445	611	0	0	2,625	2,815	1	2
Rhode Island	170	233	468	643	0	0	550	896	5	7
Vermont	87	119	184	253	0	0	0	0	0	0
Central Atlantic States										
Delaware	918	1,261	770	1,058	0	0	3,340	3,362	50	73
District of Columbia	83	114	1	1	0	0	2	0	948	1,371
Maryland	341	469	932	1,280	9	13	4,669	5,645	1,044	1,510
New Jersey	3,491	4,797	3,193	4,387	3,115	4,280	7,397	7,959	68	98
New York	14,178	19,482	7,530	10,347	82	112	54,248	56,114	493	714
Pennsylvania	835	1,148	4,077	5,602	1,853	2,546	15,543	9,458	7	10
Lower Atlantic States										
Florida	269	397	3,283	4,511	5	7	45,700	52,155	37	54
Georgia	4	5	2,244	3,083	12	16	1	57	62	90
North Carolina	140	192	4,021	5,525	2	3	0	0	22	32
South Carolina	20	28	1,517	2,085	3	4	0	6	32	46
Virginia	391	537	2,041	2,805	39	53	2,173	2,974	296	428
West Virginia	2	3	820	1,127	228	313	0	0	0	0
Total	**25,673**	**35,276**	**45,845**	**62,094**	**5,377**	**7,388**	**185,206**	**192,887**	**3,756**	**5,435**
PAD District 2										
Illinois	922	1,071	1,832	2,127	4,541	5,273	4,381	6,897	15	22
Indiana	79	92	1,455	1,689	2,622	3,045	0	0	0	0
Iowa	25	29	251	292	0	0	15	0	0	0
Kansas	3	3	418	486	233	271	106	233	0	0
Kentucky	4	4	609	707	410	476	0	0	7	10
Michigan	194	225	1,546	1,795	709	824	584	1,304	0	0
Minnesota	154	179	1,049	1,218	199	231	40	17	0	0
Missouri	28	32	233	271	267	310	203	123	79	115
Nebraska	90	105	80	93	0	0	0	0	0	0
North Dakota	186	216	259	301	269	312	0	0	225	325
Ohio	159	185	1,287	1,494	379	440	31	100	0	0
Oklahoma	0	0	38	44	502	583	0	0	0	0
South Dakota	11	13	28	32	0	0	0	0	0	0
Tennessee	91	106	502	583	21	24	0	0	0	0
Wisconsin	34	39	1,703	1,978	123	143	0	0	0	0
Total	**1,980**	**2,299**	**11,290**	**13,110**	**10,275**	**11,932**	**5,360**	**8,674**	**326**	**472**
PAD District 3										
Alabama	126	166	2,830	3,738	35	46	0	0	0	0
Arkansas	110	146	1,171	1,547	0	0	0	108	0	0
Louisiana	13,060	17,247	6,102	8,058	1,513	1,998	85	1,118	0	0
Mississippi	22	29	1,698	2,242	389	514	0	284	0	0
New Mexico	0	0	489	646	0	0	38	68	0	0
Texas	1,427	1,884	13,793	18,215	7,288	9,625	456	795	100	144
Total	**14,745**	**19,472**	**26,083**	**34,446**	**9,225**	**12,183**	**579**	**2,373**	**100**	**144**
PAD District 4										
Colorado	5	5	6	7	0	0	0	0	0	0
Idaho	16	18	186	205	0	0	0	0	0	0
Montana	5	5	272	300	1,222	1,349	0	0	0	0
Utah	35	39	305	337	441	487	0	0	0	0
Wyoming	165	182	301	332	999	1,102	0	0	0	0
Total	**226**	**249**	**1,070**	**1,181**	**2,662**	**2,938**	**0**	**0**	**0**	**0**
PAD District 5										
Alaska	1	3	0	0	0	0	336	298	0	0
Arizona	80	164	8	16	0	0	0	117	0	0
California	2,766	5,697	472	973	3,467	7,141	2,585	13,087	561	812
Hawaii	53	110	123	254	790	1,627	10,149	9,897	166	240
Nevada	5	11	11	22	0	0	23	86	0	0
Oregon	750	1,544	1,661	3,422	76	157	0	0	152	220
Washington	464	956	3,010	6,201	948	1,953	0	0	350	506
Total	**4,119**	**8,485**	**5,285**	**10,888**	**5,281**	**10,878**	**13,093**	**23,485**	**1,229**	**1,778**
U.S. Total	**46,743**	**65,781**	**89,573**	**122,619**	**32,820**	**45,319**	**204,238**	**227,419**	**5,411**	**7,829**

. . . By Categories and Uses

(Add 000 bbl.)

Destination	Railroad 1983	Railroad 1982	Vessel Bunkering 1983	Vessel Bunkering 1982	All Other 1983	All Other 1982	Total 1983	Total 1982
PAD District 1								
New England States								
Connecticut	0	0	5	6	109	150	22,311	21,349
Maine	7	10	533	620	1	2	12,670	15,803
Massachusetts	0	0	469	546	419	576	34,810	42,762
New Hampshire	0	0	24	28	0	0	3,568	4,106
Rhode Island	0	0	10	12	0	0	1,203	1,791
Vermont	0	0	0	0	0	0	271	372
Central Atlantic States								
Delaware	0	0	117	136	290	399	5,485	6,289
District of Columbia	0	0	0	0	30	41	1,064	1,527
Maryland	0	0	2,431	2,831	109	150	9,535	11,898
New Jersey	0	0	10,328	12,029	503	691	28,095	34,241
New York	0	0	2,744	3,196	79	108	79,354	90,073
Pennsylvania	0	0	1,438	1,675	255	350	24,008	20,789
Lower Atlantic States								
Florida	0	0	5,035	5,864	66	91	54,415	63,079
Georgia	0	0	1,984	2,311	0	0	4,307	5,562
North Carolina	0	0	186	217	1	2	4,372	5,971
South Carolina	3	4	680	792	0	0	2,255	2,965
Virginia	26	36	2,325	2,708	37	50	7,328	9,591
West Virginia	0	0	0	0	0	0	1,050	1,443
Total	**36**	**50**	**28,309**	**32,971**	**1,899**	**2,610**	**296,101**	**330,812**
PAD District 2								
Illinois	3	4	3	1	96	112	11,793	15,507
Indiana	0	0	72	27	3	3	4,231	4,856
Iowa	0	0	0	0	0	0	291	321
Kansas	0	0	0	0	0	0	760	993
Kentucky	0	0	0	0	0	0	1,030	1,197
Michigan	38	44	61	23	60	70	3,192	4,285
Minnesota	35	40	114	43	3	4	1,594	1,732
Missouri	0	0	5	2	3	3	818	856
Nebraska	0	0	0	0	0	0	170	198
North Dakota	0	0	0	0	15	17	954	1,171
Ohio	0	0	3	1	231	268	2,090	2,488
Oklahoma	0	0	0	0	63	73	603	700
South Dakota	0	0	0	0	5	6	44	51
Tennessee	17	20	5	2	11	13	647	748
Wisconsin	3	3	72	27	19	22	1,954	2,212
Total	**96**	**111**	**335**	**126**	**509**	**591**	**30,171**	**37,315**
PAD District 3								
Alabama	0	0	2,127	2,400	0	0	5,118	6,350
Arkansas	0	0	0	0	2	2	1,283	1,803
Louisiana	0	0	16,976	19,154	518	685	38,254	48,260
Mississippi	0	0	2,217	2,501	0	0	4,326	5,570
New Mexico	0	0	0	0	2	2	529	716
Texas	0	0	27,821	31,389	13	17	50,898	62,069
Total	**0**	**0**	**49,141**	**55,444**	**536**	**706**	**100,408**	**124,768**
PAD District 4								
Colorado	0	0	0	0	2	2	13	14
Idaho	0	0	0	0	0	0	202	223
Montana	0	0	0	0	13	14	1,512	1,668
Utah	0	0	0	0	21	23	802	886
Wyoming	8	9	0	0	8	9	1,481	1,634
Total	**8**	**9**	**0**	**0**	**44**	**48**	**4,010**	**4,425**
PAD District 5								
Alaska	0	0	0	0	0	0	337	301
Arizona	0	0	0	0	0	0	88	297
California	0	0	48,644	53,250	210	432	58,705	81,392
Hawaii	0	0	785	860	162	335	12,228	13,323
Nevada	0	0	0	0	0	0	39	119
Oregon	0	0	5,071	5,551	16	33	7,726	10,927
Washington	0	0	4,005	4,384	14	29	8,791	14,029
Total	**0**	**0**	**58,505**	**64,045**	**402**	**829**	**87,914**	**120,388**
U.S. Total	**140**	**170**	**136,290**	**152,586**	**3,390**	**4,784**	**518,604**	**628,510**

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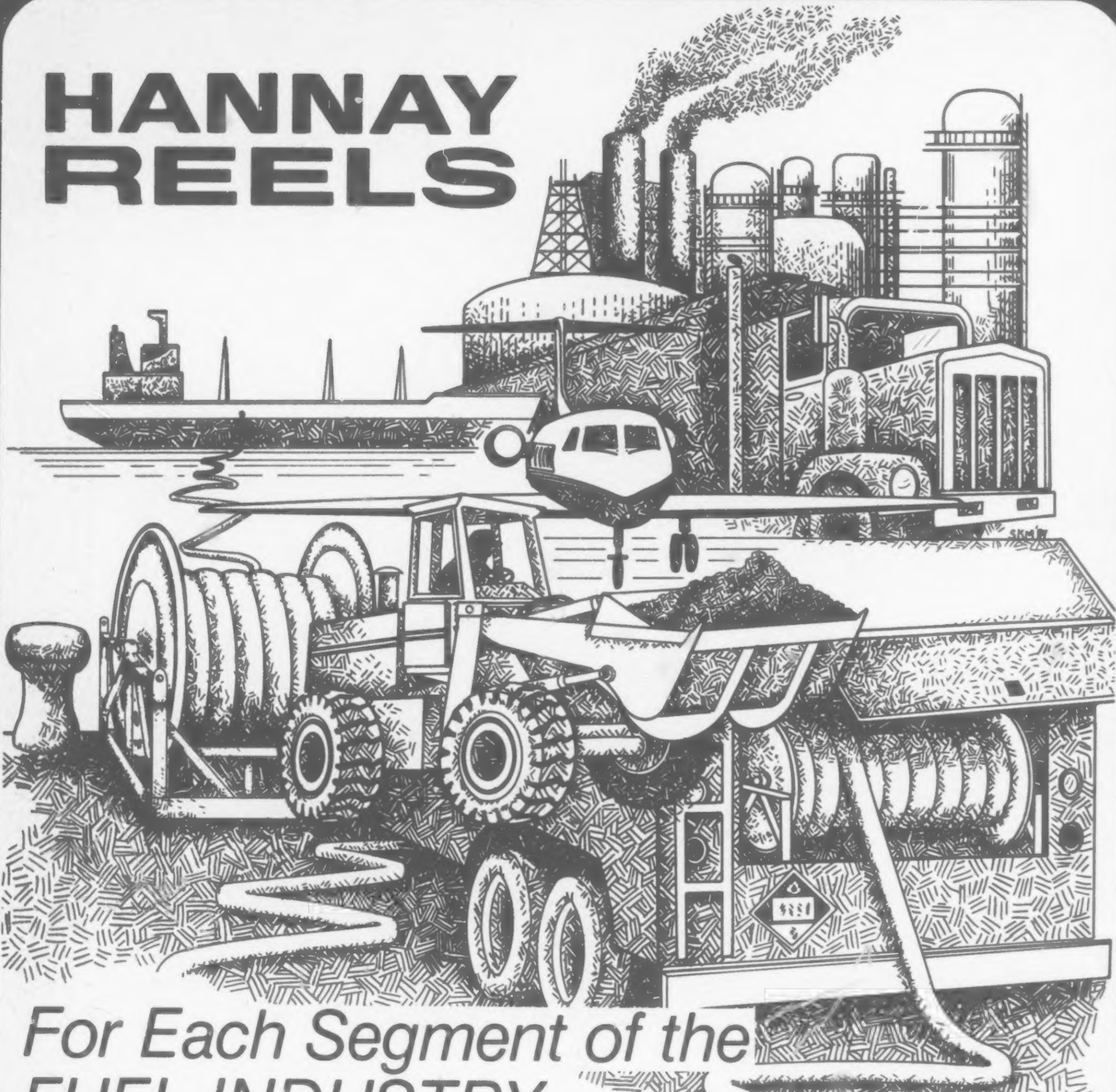

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U.S. Sales of Distillate Fuel Oil By Uses

(Add 000 bbl.)

Year	Residential	Commercial	Industrial	Farm	Oil Company	Electric Utilities	Diesel	Other	Total
1983	171,783 (b)	72,809	69,332	66,697	29,957	11,744	362,276	197,328	981,927
1982	180,760 (b)	75,669 (b)	71,340 (c)	66,453 (c)	29,482 (c)	12,134	375,124 (e)	164,253 (f)	974,864
1981 (a)	197,400 (b)	78,663 (b)	80,216 (c)	69,665 (d)	29,185 (c)	18,192	378,853 (e)	180,302 (f)	1,032,476
1980 (a)	227,261 (b)	92,136 (b)	86,089 (c)	73,615 (d)	24,205 (c)	31,812	377,136 (e)	176,355 (f)	1,086,709
1979 (a)	270,306 (b)	99,723 (b)	99,583 (c)	84,926 (d)	22,043 (c)	46,579	392,614 (e)	198,600 (f)	1,214,374

(a) In 1979, DOE changed its sampling and reporting formulas. It eliminated the "heating oils" category and added a new farm category. The sum of the first four categories is roughly related to the old heating oil category but cannot be construed as comparable. (b) Primarily space and water heating; (c) Includes some space heating but primarily equipment fuel; (d) Includes space and water heating, crop drying, farm equipment, etc. (e) Includes 37,118,000 bbl. of off-highway diesel in 1982; (f) In 1982, consisted of 93,150 railroad, 33,885 vessel bunkering, 37,118 military and 19,639 miscellaneous. For similar data on 1981, 1980, and 1979, see the 1983 Factbook. The pre-1979 categories are as follows:

Year	Heating Oils	Industrial Use	Oil Company Use	Electric Utilities	Railroads	Vessel Bunkering	Military Use	Diesel Fuel	All Other	Total
1978	533,069	94,797	19,410	77,175	99,841	37,591	20,320	367,799	14,509	1,257,061
1977	538,845	96,502	19,954	76,681	99,306	33,512	20,121	330,864	14,394	1,230,179
1976	543,895	79,956	14,523	60,570	97,467	28,330	17,574	297,249	11,385	1,150,929
1975	488,388	63,993	13,633	63,420	93,191	26,136	18,004	266,903	10,096	1,043,746
1970	521,135	43,668	11,518	24,770	88,416	19,503	12,447	194,919	10,874	927,250

Source: Deliveries of fuel oil and kerosine in 1981, Petroleum Supply Annual, Department of Energy, June 1984.

U.S. Sales of Residual Fuel Oil By Uses

(Add 000 bbl.)

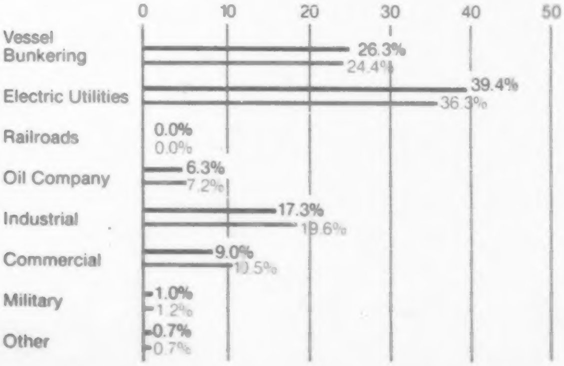
Year	Vessel Bunkering	Electric Utilities	Railroads	Oil Companies	Industrial	Commercial	Military	Other	Total
1983	136,290	204,238	140	32,820	89,573	46,743	5,411	3,389	518,604
1982	152,586	227,419	170	45,319	122,619	65,781	7,629	4,784	626,510
1981 (a) ...	188,632	325,486	178	51,870	117,024	67,035	7,008	4,795	762,030
1980 (a) ...	213,131	390,105	665	59,519	163,564	98,034	8,066	4,382	937,466
1979 (a) ...	190,543	486,636	245	51,062	198,750	82,729	7,736	16,900	1,034,610

(a) In 1979, DOE changed its sampling and reporting formulas in such a way that none of the new data are directly comparable to the pre-1979 data, which follow. Also, in its 1981 update, DOE revised the totals for 1979 and 1980.

Year	Vessel Bunkering	Electric Utilities	Railroads	Oil Company	Industrial Use	Heating Oils	Military Use	All Other	Total
1978	157,495	533,193	206	57,690	169,403	164,536	16,583	4,127	1,103,233
1977	128,966	569,429	329	60,582	171,967	168,279	16,646	4,729	1,129,927
1976	117,458	492,974	423	58,212	153,596	178,139	18,561	5,785	1,025,148
1975	96,673	454,935	583	50,487	116,675	154,103	19,068	6,066	898,572
1970	89,850	312,420	2,222	38,318	139,647	185,031	28,704	7,925	804,287

Sales of Residuals by Use as Percent of Total

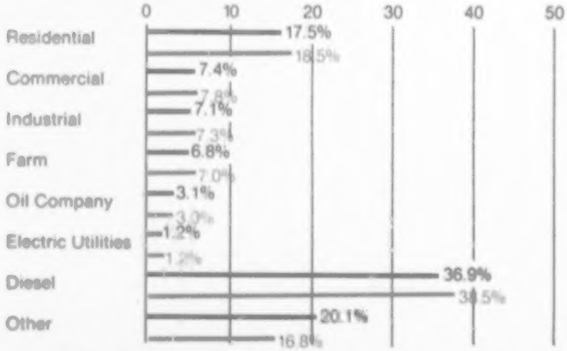
1983 = 518,604,000 bbl. 1982 = 626,510,000 bbl.



Source: Deliveries of Fuel Oil and Kerosine in 1983, Energy Information Administration, Petroleum Supply Annual, June 1984.

Sales of Distillates by Use as Percent of Total

1983 = 981,927,000 bbl. 1982 = 974,864,000 bbl.



Source: Deliveries of Fuel Oil and Kerosine in 1983, Energy Information Administration, Petroleum Supply Annual, June 1984.

Fuel Oil Dealer Population By States—1982 vs. 1977

In the summer and fall of 1984, when the U.S. Census Bureau processed the data compiled in its 1982 Census of Retail Trade, it discovered that it could not provide the traditional population totals because some questions and answers had not been catalogued properly. Thus, the 1982 population profile is of the establishments with payrolls only. It does not take into consideration the smaller family businesses which comprise about 10% to 15% of the retail fuel oil industry. The totals on this page, therefore, are not strictly comparable with the "universe" totals published in past *NPN Factbooks*.

	Establishments with payrolls		Sales		Annual payroll		Paid employees
	1982	1977	1982 ($1,000)	% change 1977 to 1982	1982 ($1,000)	% change 1977 to 1982	1982
United States	6,077	7,368	$11,937,189	80.2	$833,825	32.3	53,152
Alabama	7	12	6,602	94.4	330	−3.2	33
Alaska	39	45	91,459	(D)	6,060	(D)	270
Arizona	6	5	728	6.0	75	−22.7	7
Arkansas	7	10	12,755	267.2	467	94.6	39
California	24	31	19,362	169.2	1,267	72.1	113
Colorado	9	13	4,584	5.9	237	−41.6	23
Connecticut	365	408	803,357	102.7	63,272	51.9	3,489
Delaware	51	63	106,702	93.8	6,196	14.0	440
District of Columbia	10	10	75,995	(D)	4,957	(D)	280
Florida	130	158	106,472	69.4	8,462	21.2	839
Georgia	16	20	21,736	202.4	1,065	72.3	106
Hawaii	1	3	(D)	(D)	(D)	(D)	(D)
Idaho	12	23	4,991	−47.7	365	−50.1	56
Illinois	89	150	144,773	6.5	6,300	−45.5	398
Indiana	89	122	117,856	15.5	6,383	−14.7	492
Iowa	48	61	45,232	50.6	2,797	15.4	199
Kansas	20	23	14,873	95.2	1,015	25.8	88
Kentucky	31	33	22,223	116.5	1,332	62.8	117
Louisiana	9	15	8,586	88.5	566	22.8	48
Maine	201	235	357,388	71.3	21,679	24.4	1,702
Maryland	130	152	367,717	110.5	25,371	44.8	1,696
Massachusetts	778	870	1,324,084	87.1	100,356	39.2	6,353
Michigan	131	199	183,896	35.6	10,705	1.1	1,023
Minnesota	96	125	145,753	(D)	7,773	(D)	656
Mississippi	9	12	2,616	94.8	201	54.6	28
Missouri	41	57	31,658	37.5	1,567	−.3	167
Montana	8	7	2,482	(D)	189	(D)	17
Nebraska	16	18	13,482	(D)	654	(D)	75
Nevada	7	7	16,038	106.4	1,476	53.3	76
New Hampshire	140	169	246,321	109.6	20,579	70.8	1,491
New Jersey	531	629	1,197,062	68.4	91,763	29.4	5,309
New Mexico	1	4	(D)	(D)	(D)	(D)	(D)
New York	997	1,272	2,833,398	78.0	206,540	34.3	11,007
North Carolina	259	336	250,658	40.5	15,605	9.3	1,327
North Dakota	32	28	36,348	183.3	1,729	84.7	143
Ohio	130	146	157,122	89.2	8,203	33.0	609
Oklahoma	17	19	4,578	51.8	385	40.0	38
Oregon	61	98	129,341	43.7	9,537	−5.1	658
Pennsylvania	599	659	1,410,330	88.3	92,224	36.9	6,276
Rhode Island	151	174	247,866	95.3	18,809	31.2	1,260
South Carolina	82	101	81,310	69.6	4,248	19.3	399
South Dakota	25	24	17,788	(D)	1,066	(D)	110
Tennessee	15	18	16,577	50.5	758	−7.0	79
Texas	50	61	68,509	84.2	3,323	5.7	244
Utah	11	6	31,283	(D)	1,256	(D)	97
Vermont	92	107	139,509	62.5	10,375	25.2	752
Virginia	211	250	505,425	127.3	32,560	47.8	2,433
Washington	118	195	215,233	75.7	17,716	19.4	937
West Virginia	14	13	16,719	167.3	868	.5	70
Wisconsin	158	167	280,685	98.7	14,904	38.6	1,062
Wyoming	3	5	2,308	(D)	123	(D)	13

(D) Data withheld by Census Bureau to avoid disclosing data for individual companies.
Source: U.S. Census Bureau, 1982 Census of Retail Trade, published in 1984.

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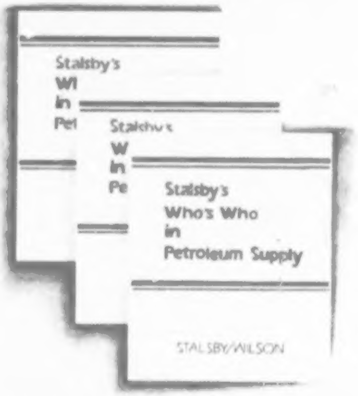

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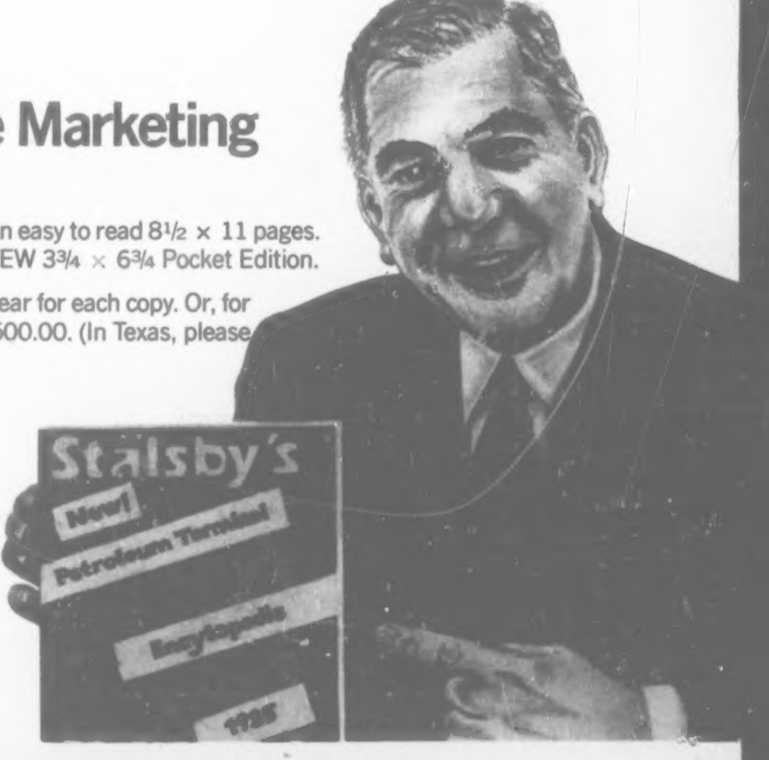

Industry Profile–1984

Average Size of Business

	No. Residential Fuel Oil Accts.	No. C/I Customers	Vol. Distillate	Vol. Residual	Vol. Gasoline	No. Employees
New England	1,938	157	2,463,078 gal.	1,011,950 gal.	3,134,269 gal.	12.9
Mid-Atlantic	2,815	271	3,537,228	6,854,333	2,018,500	24.1
South	1,235	114	1,514,167	N.R.	3,014,286	12.9
Midwest	501	101	1,575,380	663,072	1,946,242	10.6
West	1,756	265	2,216,667	261,250	2,880,834	9.0
All Sections	**1,649**	**181**	**2,261,304**	**2,118,121**	**2,598,825**	**13.9**

N/R—Not Reported

Petroleum Products Sold (% of Total Volume)

	No. 2	No. 1	No. 4	No. 5 & 6
New England	85.2%	3.2%	0.2%	0.1%
Mid-Atlantic	75.1	6.4	0.4	2.3
South	34.8	9.5	*	*
Midwest	35.0	5.8	*	0.5
West	50.9	6.3	1.4	1.7
All Sections	**56.2%**	**6.2%**	**0.4%**	**0.9%**

	No. 2 for Diesel	Gasoline	LPG/LNG	Other
New England	4.5%	6.4%	2.0%	4.4%
Mid-Atlantic	7.6	15.4	1.1	0.2
South	22.5	34.1	*	*
Midwest	15.6	38.1	3.9	1.0
West	19.8	18.3	*	1.7
All Sections	**14.0%**	**22.5%**	**1.4%**	**1.5%**

---

*Less than .1%

Percent of Dealers Selling, Installing and Servicing Equipment

Residential

	Oil Burners	Gas Burners	Domestic Hot Water	Boilers	Hydronic Systems
New England	93.8%	23.1%	96.9%	84.6%	61.5%
Mid-Atlantic	94.5	32.7	83.6	70.9	52.7
South	26.7	6.7	*	13.3	6.7
Midwest	80.0	53.3	33.3	40.0	26.7
West	66.7	16.7	33.3	50.0	16.7
All Sections	**72.3%**	**26.5%**	**49.4%**	**51.8%**	**32.9%**

Commercial/Industrial

	Oil Burners	Gas Burners	Domestic Hot Water	Boilers	Hydronic Systems
New England	66.2%	12.3%	50.8%	44.6%	29.3%
Mid-Atlantic	69.1	20.0	56.4	52.7	34.5
South	20.0	6.7	6.7	6.7	*
Midwest	40.0	26.7	13.3	26.7	6.7
West	44.4	5.6	27.8	33.3	16.7
All Sections	**47.9%**	**14.3%**	**31.0%**	**32.8%**	**17.4%**

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*Less than .1%

The Service Department—A Bird's Eye View

	Have Service Depts.	Average No. Calls per Year	Value of Parts/Inventory	Service Dept. Profitable	No. of Technicians
New England	82.7%	1,090	$22,129	40.3%	4.2
Mid-Atlantic	77.5	3,109	24,329	43.6	5.3
South	36.3	275	25,875	25.0	0.8
Midwest	30.0	373	15,780	75.0	1.7
West	61.1	1,720	11,143	72.7	2.8
All Sections	**57.5%**	**1,313**	**$19,851**	**51.3%**	**3.0**

Source: Fuel Oil News, a Hunter Publication, December 1984.

Annual Sales by Types of Customers

	Private Homes	Apts.	Schls.	Hospitals	Commercial	Industrial
New England	86.0%	4.4%	1.0%	0.2%	6.7%	1.6%
Mid-Atlantic	81.1	4.6	0.1	0.7	10.2	3.2
South	63.1	3.0	0.4	0.4	16.3	12.8
Midwest	70.0	2.5	1.6	0.9	15.3	4.5
West	76.4	3.7	2.4	0.4	9.9	10.7
All Sections	**75.3%**	**3.5%**	**1.7%**	**0.5%**	**11.7%**	**6.6%**

Electronic Data Processing (% Using)

	Use EDP	Use Computers In Office	# Units (Terminals, PCs, etc.)
New England	41.3%	41.3%	2.3
Mid-Atlantic	60.9	56.5	2.3
South	60.0	60.0	1.3
Midwest	38.5	38.5	1.4
West	61.1	50.0	0.4
All Sectors	**52.4%**	**49.3%**	**1.5**

EDP Applications (by %)

	New England	Mid-Atlantic	South	Midwest	West	All Sections
General ledger	58.1%	59.5%	66.7%	75.0%	77.8%	67.4%
Accounts payable	45.2	54.8	77.8	70.0	77.8	65.1
Accounts receivable billing	93.5	100.0	100.0	100.0	100.0	98.7
Inventory reconciliation	35.5	40.4	55.6	55.0	100.0	57.3
Payroll	38.7	50.0	44.4	70.1	77.8	56.2
Fixed asset management	12.9	21.4	33.3	15.0	44.4	25.4
Excise tax reporting	22.6	23.8	33.3	30.1	100.0	41.9
Communications with stations	6.5	4.8	*	5.0	*	3.3
Tracking supplier costs	9.7	9.5	33.3	5.1	*	11.5
Pricing analysis	12.9	9.5	22.2	5.0	22.2	14.4
Word processing	45.2	26.2	44.4	15.0	55.6	37.3
Scheduling of deliveries	74.2	54.8	44.4	15.9	44.4	47.6

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*Less than .1%

Trucks per Marketer

	Average No. Del. Trucks	Average No. Trailers	Average Size		Optimum Size Preferred
			Largest	Smallest	
New England	4.5	0.5	2,855	2,163	2,928
Mid-Atlantic	5.2	0.7	3,198	2,149	2,970
South	4.0	1.3	2,282	1,723	2,320
Midwest	3.0	0.6	2,246	1,716	2,310
West	4.9	0.7	2,730	1,711	2,843
All Sections	**4.3**	**0.8**	**2,662**	**1,892**	**2,674**

Truck Tanks by Type

	Use			Prefer	
	Steel	Alum.	Both	Steel	Alum.
New England	67.1%	7.1%	25.7%	31.4%	48.6%
Mid-Atlantic	36.8	14.7	48.5	23.5	57.4
South	46.7	6.7	46.7	13.3	40.7
Midwest	64.2	7.5	18.9	35.8	28.3
West	33.3	11.1	50.0	5.6	77.8
All Sections	**49.6%**	**9.4%**	**38.0%**	**21.9%**	**51.8%**

Source: Fuel Oil News, a Hunter Publication, December 1984.

Average Drop (Gal.)

	275-Gal. Tanks
New England	172.4
Mid-Atlantic	169.9
South	162.5
Midwest	167.0
West	171.6
All Sections	**172.7**

	550-Gal. Tanks
New England	360.8
Mid-Atlantic	354.0
South	385.8
Midwest	403.6
West	355.0
All Sections	**371.8**

% Selling, Installing & Servicing Equipment

New England	86.7%
Mid-Atlantic	77.5
South	26.7
Midwest	26.8
West	55.5
All Sections	**54.6%**

By Types of Equipment

Residential

	Furnaces	Warm Air Systems
New England	92.3%	83.1%
Mid-Atlantic	92.7	61.8
South	13.3	6.7
Midwest	80.0	53.3
West	66.7	50.0
All Sections	**69.0%**	**51.0%**

	Central A/C	Heat Pump
New England	18.5%	9.2%
Mid-Atlantic	43.6	23.6
South	13.3	*
Midwest	40.0	13.3
West	11.1	22.2
All Sections	**25.3%**	**13.7%**

Commercial

	Furnaces	Warm Air Systems
New England	58.5%	46.2%
Mid-Atlantic	56.4	38.2
South	13.3	*
Midwest	33.3	20.0
West	44.4	22.2
All Sections	**41.2%**	**25.3%**

	Central A/C	Heat Pump
New England	13.8%	3.1%
Mid-Atlantic	25.5	12.7
South	6.7	*
Midwest	20.0	13.3
West	5.6	5.6
All Sections	**14.3%**	**6.9%**

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*Less than .1%

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World Oil Production by Area

(Add 000 bbl.)

Year	United States	Canada	Latin American	Western Europe	Middle East	Africa	Asia-Pacific	Total Free World	Communist Nations	Total World
1983	3,159,440	529,250	2,213,360	1,236,620	4,215,385	1,609,650	1,024,555	13,988,260	5,286,295	19,274,555
1982	3,156,715	452,965	2,255,355	1,085,145	4,581,480	1,622,790	961,410	14,116,160	5,278,995	19,395,155
1981	3,128,780	469,025	2,179,415	955,570	5,749,480	1,672,065	1,027,110	15,181,445	5,192,125	20,373,570
1980	3,146,502	521,184	2,036,058	893,406	6,735,498	2,226,378	1,000,278	16,559,304	5,206,350	21,765,654
1979	3,114,545	546,040	1,919,535	828,550	7,868,670	2,423,600	1,051,200	17,752,140	5,118,030	22,870,170
1978	3,175,927	483,260	1,736,427	643,149	7,884,927	2,233,791	1,037,520	17,195,001	4,963,250	22,158,251
1977	3,009,265	482,021	1,647,362	489,328	8,186,851	2,276,007	1,017,244	17,108,078	4,792,617	21,900,695
1976	2,976,180	488,680	1,625,069	311,858	8,115,708	2,134,861	922,818	16,575,174	4,616,366	21,191,540

Source: American Petroleum Institute Data Book, January 1985

World Crude Oil Reserves by Area

(Add 000 bbl.)

Year (a)	United States	Canada	Latin America	Middle East	Africa	Asia-Pacific	Western Europe	Total Free World	Communist Nations	Total World
1984	27,735,000	6,730,000	81,675,900	370,100,900	56,970,000	18,969,400	23,019,940	585,137,600	84,600,000	669,737,600
1983	29,785,000	7,020,000	74,482,066	369,285,893	57,821,690	19,756,077	22,923,680	583,147,406	85,115,000	668,262,406
1982	29,426,000	7,300,000	84,982,270	362,839,950	56,171,630	19,150,800	24,634,500	584,505,150	85,845,000	670,350,150
1981	29,805,000	6,400,000	69,489,837	362,071,000	55,148,375	19,630,500	23,085,000	565,629,712	86,300,000	651,929,712
1980	27,051,289	6,800,000	56,472,500	361,947,300	57,072,100	19,355,200	23,476,400	522,174,789	90,000,000	642,174,789
1979	27,803,760	6,860,000	41,246,500	369,996,000	57,892,125	20,007,200	23,966,000	547,771,585	94,000,000	641,771,585
1978	29,486,402	5,970,872	40,370,000	366,166,000	59,200,150	19,749,270	26,862,500	547,605,194	98,000,000	645,805,194
1977	30,942,166	6,257,082	29,608,950	367,681,220	60,570,200	19,391,140	24,538,810	538,989,568	101,100,000	640,089,568

(a) As of Jan. 1 of each year.
Source: American Petroleum Institute Data Book, January 1985

World Crude Oil Refining Capacity by Area

(barrels per day)

Year	United States	Other Western Hemisphere	Total Western Hemisphere	Middle East	Africa	Asia-Pacific	Europe	Total Free World	Sino-Soviet Bloc	Total World
1984	16,137,141	9,590,962	25,520,962	3,901,082	1,879,990	10,473,079	16,231,932	58,114,186	17,200,000	75,314,186
1983	16,859,337	9,873,816	26,773,153	3,685,333	1,822,105	10,902,204	17,124,989	60,327,784	16,873,000	77,200,784
1982	17,889,734	10,720,055	28,609,789	3,312,152	1,761,870	10,966,825	19,444,519	64,095,155	16,533,000	80,628,155
1981	18,620,520	10,716,881	29,337,401	3,729,646	1,697,658	10,554,691	20,205,799	65,524,895	16,036,500	81,561,395
1980	17,988,121	10,683,671	28,671,792	3,518,080	1,666,108	10,386,375	20,243,747	64,486,102	15,346,000	79,832,102
1979	17,440,885	10,273,030	27,713,915	3,546,029	1,667,608	10,284,966	20,328,614	63,541,132	14,748,000	78,289,132
1978	17,047,724	10,592,020	27,352,020	3,506,484	1,467,157	10,176,813	20,728,204	63,352,984	13,938,000	77,290,984
1977	16,398,372	10,015,186	26,413,558	3,347,855	1,444,400	10,047,965	20,859,376	62,113,154	13,067,810	75,180,964

Source: American Petroleum Institute Data Book, January 1985

World Natural Gas Production by Area

(Add 000,000 cubic feet)

Year	United States	Canada	Latin America	Middle East	Africa	Asia-Pacific	Western Europe	Total Free World	Communist Nations	Total World
1983	16,599,000	2,414,100	3,340,500	1,633,000	1,143,800	2,187,700	6,383,400	33,701,500	21,383,000	55,084,500
1982	18,519,675	2,546,100	3,091,500	1,799,700	1,168,900	2,176,600	6,142,100	35,424,575	20,258,000	55,682,575
1981	19,955,823	2,623,000	3,227,000	1,542,000	1,947,000	2,765,000	6,906,000	39,187,701	19,210,000	58,397,701
1980	20,179,724	2,668,300	3,297,500	1,221,300	884,700	2,558,400	6,668,700	37,677,687	21,069,900	58,747,587
1979	20,471,260	3,646,500	2,610,000	1,624,700	1,027,900	1,827,900	6,866,800	38,075,060	19,591,400	57,666,460
1978	19,974,033	3,128,056	2,012,912	1,579,478	1,117,416	1,469,154	6,649,855	35,930,904	15,818,398	51,749,302
1977	20,025,463	3,230,672	1,865,734	1,506,982	919,464	1,329,016	6,502,502	35,379,833	14,720,257	50,100,090
1976	19,952,438	3,067,353	1,722,106	1,492,772	905,792	1,173,878	6,343,593	34,657,932	14,801,281	49,459,213

Source: American Petroleum Institute Data Book, January 1985

Crude Oil Reserves in 20 Leading Nations

Nation	Reserves (Add 000 bbl.) 1984	Reserves (Add 000 bbl.) 1983	% of Free World Reserves 1984	% of Free World Reserves 1983	% of Total World Reserves 1984	% of Total World Reserves 1983
Saudi Arabia (a)	166,000,000	162,400,000	28.4%	27.8%	24.8%	24.3%
Kuwait (a)	63,900,000	64,230,000	10.9	11.0	9.5	9.6
U.S.S.R.	63,000,000	63,000,000	—	—	9.4	9.4
Iran	51,000,000	55,308,000	8.7	9.5	7.6	8.3
Mexico	48,000,000	48,300,000	8.2	8.3	7.2	7.2
Iraq	43,000,000	41,000,000	7.3	7.0	6.4	6.1
Abu Dhabi	30,400,000	30,510,000	5.2	5.2	4.5	4.6
United States	27,735,000	27,858,000	4.7	4.8	4.1	4.2
Venezuela	24,850,000	21,500,000	4.2	3.7	3.7	3.2
Libya	21,270,000	21,500,000	3.6	3.7	3.2	3.2
China	19,100,000	19,485,000	3.3	3.3	2.9	2.9
Nigeria	16,550,000	16,750,000	2.8	2.9	2.5	2.5
United Kingdom	13,150,000	13,900,000	2.2	2.4	2.0	2.1
Algeria	9,220,000	9,440,000	1.6	1.6	1.4	1.4
Indonesia	9,100,000	9,550,000	1.6	1.6	1.4	1.4
Norway	7,660,000	6,800,000	1.3	1.2	1.1	1.0
Canada	6,730,000	7,020,000	1.2	1.2	1.0	1.1
India	3,485,000	(b)	0.6	—	0.5	—
Egypt	3,450,000	3,325,000	0.6	0.6	0.5	0.5
Qatar	3,330,000	3,425,000	0.6	0.6	0.5	0.5
Total Free World	**585,137,600**	**583,147,406**	—	—	**87.4%**	**87.3%**
Total World	**669,737,000**	**668,262,406**	—	—	—	—

(a) Saudi Arabia and Kuwait share equally the production from the Neutral Zone which had reserves of 5,695,000,000 bbl. in 1984.
(b) Not ranked in top 20 in 1983.
Source: American Petroleum Institute, Basic Data Book, January 1985.

Crude Production in 20 Leading Nations

Nation	Production (Add 000 bbl.) 1983 Total	1983 b/d	1982 Total	1982 b/d	% of Free World Production 1983	% of Free World Production 1982	% of Total World Production 1983	% of Total World Production 1982
U.S.S.R.	4,363,900	11,956	4,368,760	12,024	—	—	22.6%	22.6%
United States (a)	3,170,999	8,688	3,156,715	8,649	22.7%	22.4%	16.5	16.3
Saudi Arabia (b)	1,776,455	4,867	2,304,975	6,315	12.7	16.3	9.2	11.9
Mexico	979,660	2,584	1,086,970	2,978	7.0	7.7	5.1	5.6
Iran	909,580	2,492	808,110	2,214	6.5	5.7	4.7	4.2
United Kingdom	839,135	2,299	772,705	2,117	6.0	5.5	4.4	4.0
China	769,005	2,107	740,585	2,029	5.5	5.2	4.0	3.8
Venezuela	653,350	1,790	690,215	1,891	4.5	4.9	3.4	3.6
Canada	529,250	1,450	452,695	1,241	3.8	3.2	2.7	2.3
Indonesia	505,525	1,385	488,735	1,339	3.6	3.5	2.6	2.5
Nigeria	429,965	1,178	472,675	1,295	3.1	3.3	2.2	2.4
United Arab Emirates	408,070	1,118	443,110	1,214	2.9	3.1	2.1	2.3
Libya	392,740	1,076	422,670	1,158	2.8	3.0	2.0	2.2
Iraq	336,530	922	354,780	972	2.4	2.5	1.7	1.8
Kuwait (b)	321,565	881	244,915	671	2.3	1.7	1.7	1.3
Algeria	255,135	699	259,150	710	1.8	1.8	1.3	1.3
Egypt	251,485	700	242,725	665	1.8	1.7	1.3	1.3
Norway	224,110	614	189,070	518	1.6	1.3	1.2	1.0
Brunei-Malaysia	190,895	523	167,900	460	1.4	1.2	1.0	0.9
Argentina	174,835	479	176,660	484	1.2	1.3	0.9	0.9
Total Free World	**13,988,260**	**38,324**	**14,116,160**	**38,674**	—	—	**72.6%**	**72.8%**
Total World	**19,274,555**	**52,807**	**19,395,155**	**53,137**	—	—	—	—

(a) Includes lease condensate.
(b) Excludes Neutral Zone Production.
Source: American Petroleum Institute, Basic Data Book, January 1985.

World Oil Demand To Rise Slowly

A long range projection by Conoco Inc. anticipates that world oil demand will grow at a rate of 1% per year through the year 2000. In barrels per day, it is expected to rise from 46-million in 1984 to 54-million in 2000.

Conoco noted that while oil demand has been stimulated by the 20% decline in crude oil prices since 1981, the price shocks of the last decade are continuing to restrain overall growth.

The long-range projection, updated last spring, offered these terse commentaries:

Growth will be slower in the developed world, where many non-oil energy projects such as coal, nuclear power plants and gas pipelines are currently underway. High-cost alternatives to oil are less prevalent in the Third World due to the large external debts of many developing countries. Nonetheless, even in the Third World, oil will constitute a declining share of energy use as every effort is made to conserve foreign exchange and exploit domestically produced alternatives.

Gasoline consumption will grow slowly but decline as a share of the product barrel due primarily to improvement of the fuel efficiency of the U.S. vehicle fleet. Growth in middle distillate demand will be relatively robust as expanded use of kerosine jet and diesel fuel offsets slow growth in consumption of heating oil, which will face generally stiff competition from gas and electricity in North America and Western Europe.

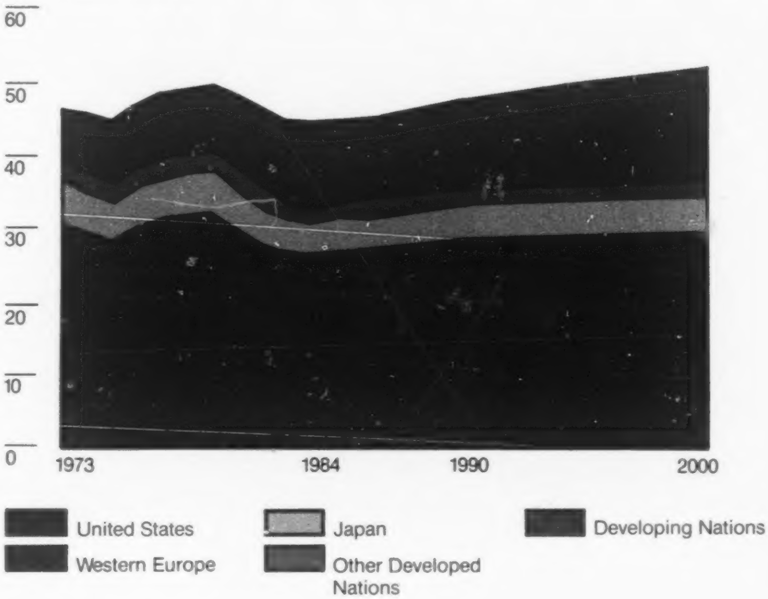
Residual fuel oil demand will be fairly stable until 2000. Given the oil price outlook, very few additional conversions out of fuel oil in the power and industrial sectors will go forward.

Lower crude oil price prospects have seriously discouraged exploration and development efforts in non-OPEC countries. This will lead to slowly declining total non-OPEC supplies in the 1990s.

Slowly rising demand and peaking non-OPEC supplies imply increasing reliance on OPEC oil in the years ahead. This trend is not readily apparent because more than a third of OPEC's production capacity stands idle and the predominant near-term price pressures are downward. But, by the early 1990s most of OPEC's remaining excess capacity will be concentrated in countries such as Saudi Arabia with the least-pressing revenue needs. Simultaneously, OPEC's production will become increasingly concentrated in the Middle East, where the bulk of its reserves remain, but where the potential for supply interruptions is also higher. OPEC will also realize rapidly rising oil export revenues in the 1990s. Altogether, these factors will restore OPEC to a much more powerful position in world oil markets.

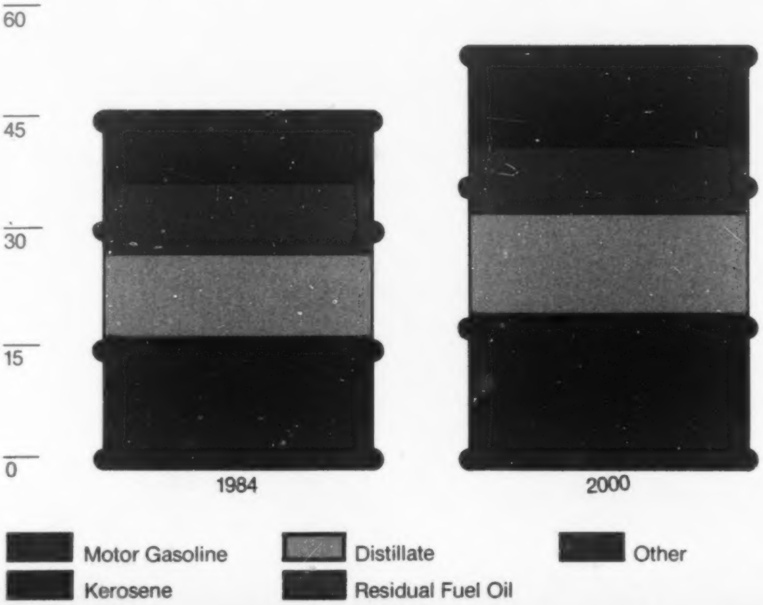
Regional World Oil Demand

(Million Barrels Per Day)



World Oil Product Demand

(Million Barrels Per Day)



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The best blade you can sell. Tests prove it.

ANCO is the number one brand in the wiper blade business. Because, quite simply, we build the best wiper blades money can buy.

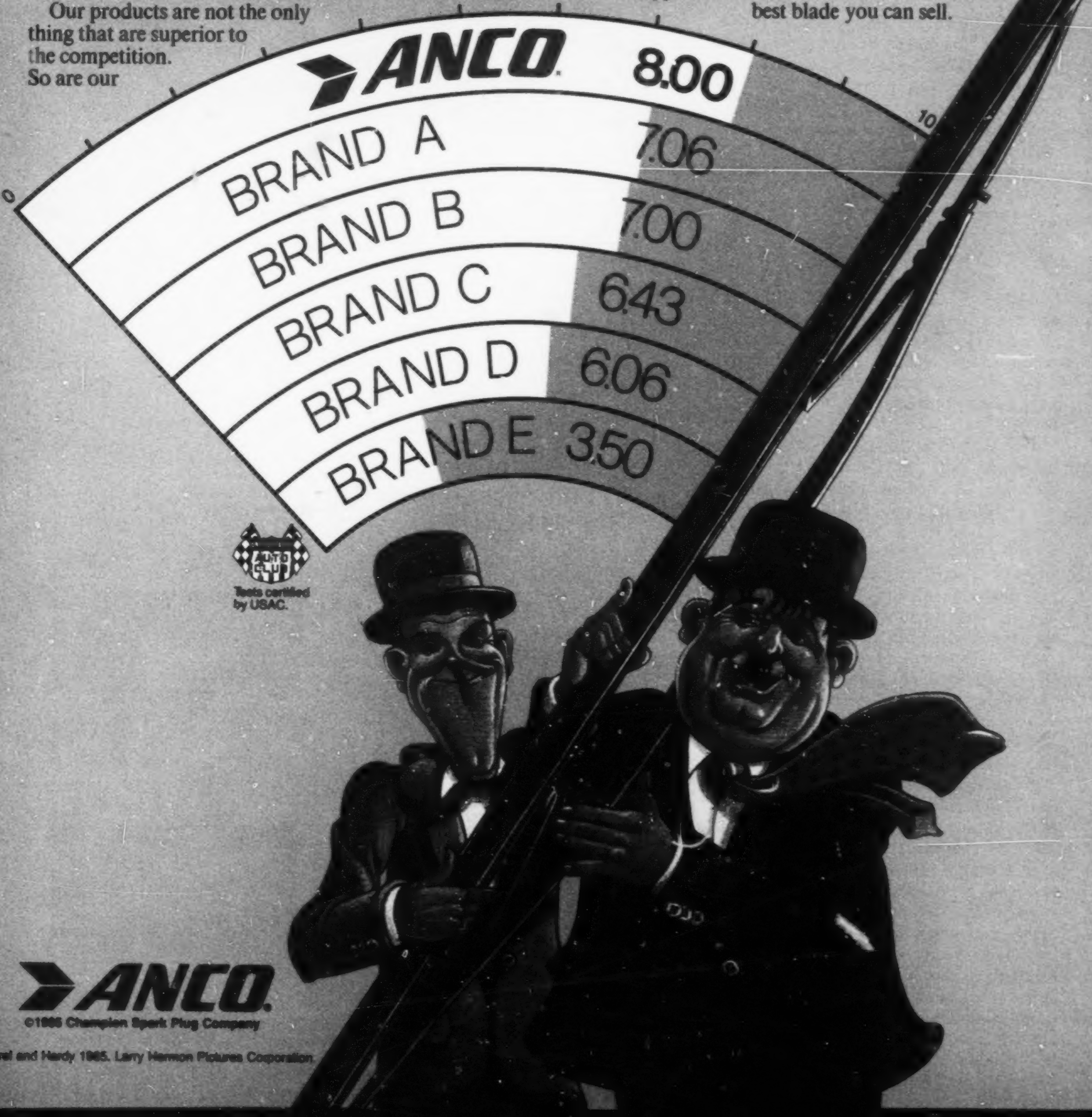
That's why in a recent wiper blade test, certified by USAC, we came out on top. ANCO had the best overall rating (averaging 8 out of a possible 10 points) of all major wiper brands, cleaning windshields better than any other blade tested.

But ANCO blades not only clean better, they sell better. Which gives customers like you a real advantage in the market place.

Our products are not the only thing that are superior to the competition. So are our support programs. No one else has an exciting national television campaign like our Laurel & Hardy series. No one else offers a successful, consumer-oriented rebate program year after year. And no one else supplies you with dynamic merchandising and point-of-purchase materials like ours.

Put that all together and you've got the best-made, best-known and best-selling wiper blade in the business, ANCO.

For more information, contact your ANCO supplier. You'll discover that ANCO is the best blade you can sell.



AUTO CLUB

Tests certified by USAC.

ANCO.

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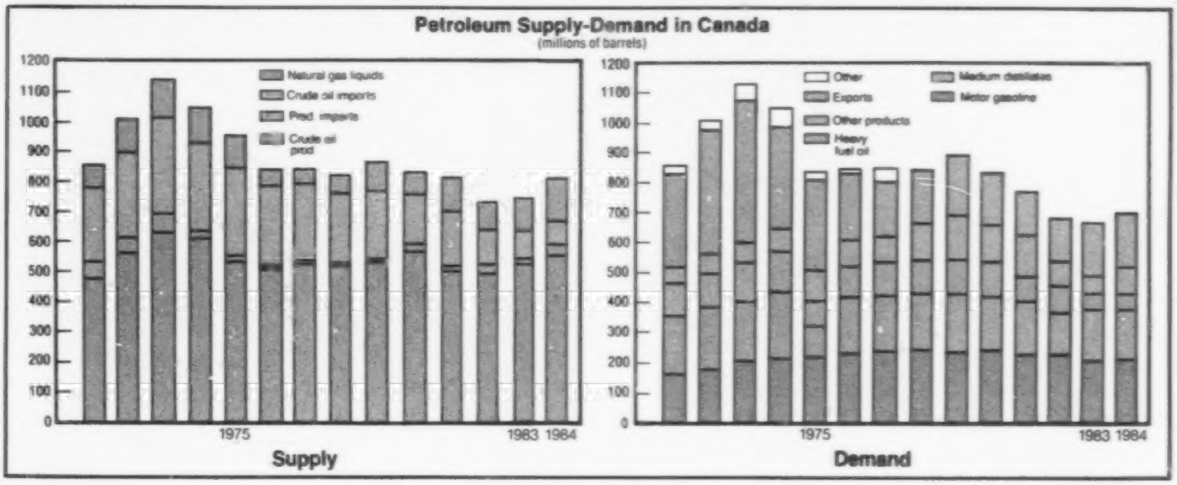
*Laurel and Hardy 1985. Larry Harmon Pictures Corporation.



Petroleum Supply-Demand in Canada
(millions of barrels)

Refined Product Sales in 1984

(Cubic Meters*)

	Aviation Gas	Motor Gas	Aviation Turbine	Kerosene	Diesel	Light Fuel	Heavy Fuel	Lubes & Greases
Newfoundland	4,472	550,510	239,380	48,386	454,700	292,199	400,605	12,448
Prince Edward Island	2,658	169,196	6,883	13,894	56,319	118,669	8,932	2,029
Nova Scotia	2,362	1,123,365	149,995	69,550	624,534	799,635	753,172	29.809
New Brunswick	2,752	905,127	47,471	40,143	372,337	463,109	1,169,250	22,634
Quebec	25,627	6,758,338	816,023	200,929	2,394,131	2,864,643	2,766,395	157,336
Ontario	42,270	11,788,403	1,314,305	142,018	3,827,699	2,566,149	1,283,614	441,668
Manitoba	21,612	1,479,841	172,176	70,962	797,164	69,242	83,218	32,843
Saskatchewan	11,859	1,873,602	82,886	104,715	1,125,888	120,781	36,269	45,693
Alberta	22,673	4,437,321	736,812	47,089	2,663,403	76,768	30,410	97,043
British Columbia	28,006	3,728.469	500,802	65,926	2,180,189	470,618	674,661	85,737
Yukon	3,852	51,123	4,201	12,815	50,998	23,195	0	1,065
Northwest Terr.	9,269	49,521	72,592	54,623	235,630	56,672	20,314	3,438
Total 1984	**177,412**	**32,914,816**	**4,143,526**	**871,049**	**14,782,992**	**7,921,680**	**7,226,840**	**931,743**
Total revised 1983	**179,479**	**33,186,570**	**3,905,449**	**870,450**	**13,924,353**	**8,520,529**	**8,016,836**	**885,850**

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*Note: (cubic meters) × 6.2886 = barrels; also 1 barrel equals 42 U.S. gal.
Source: Statistics Canada

Gasoline Outlets

Province	Outlets
Newfoundland	—
Prince Edward Island	194
Nova Scotia	1,525
New Brunswick	1,394
Quebec	—
Ontario	7,764
Manitoba	2,641
Saskatchewan	—
Alberta	10,933
British Columbia	9,739
Yukon	61
Northwest Territories	—

Source: Statistics Canada

Premium Ratios

	Premium *	
Province	Dec. '83	Dec. '84
Alberta/Northwest Territories	6.1%	5.4%
British Columbia/Yukon	9.3	9.3
Manitoba	3.7	3.5
Maritimes	8.8	9.2
Newfoundland	5.9	5.0
Ontario	11.4	11.4
Quebec	15.7	17.1
Saskatchewan	3.5	3.3
Total Canada	**10.5**	**10.6**

---

*Contains leaded and unleaded premium.
Source: Ethyl Corp., Chemicals Group

Canadian Oil Companies:

Company	Total branded retail outlets	Number of Provinces where marketed	BRANDED SERVICE STATIONS						
			Supplied directly	Supplied through jobbers & commission agents	Lessee/Dealer operated	Salary operated	Commission operated	Full-serve only	Self-serve only
Chevron Canada Ltd. (A)	—	1	—	—	—	—	—	—	—
Esso Petroleum Canada	3,431	10	2,231	1,200	2,896	76	459	2,785	646
Federated Co-Op. Ltd.	505	4	505	0	501	4	0	275	230
Gulf Canada Ltd. (C)	2,487	10	—	—	2,335	152	0	2,022	461
Husky Oil Ltd.	317	5	317	—	317	—	—	223	91
Irving Oil Ltd. (x)	—	—	—	—	—	—	—	—	—
Loeb Inc. (B)	95	2	95	—	37	12	46	95	—
Mohawk Oil Co. Ltd.	354	5	276	78	216	115	27	221	127
Petro-Canada Prod. Inc.	2,497	10	2,324	173	2,017	50	430	1,892	601
Shell Canada Ltd. (C)	3,433	10	2,274	1,159	2,826	153	454	2,863	570
Spur Oil Ltd. (C) (Div. of Murphy Oil Co. Ltd.)	141	2	141	0	97	0	0	128	13
Sunys Petroleum Inc.	195	2	195	—	74	9	112	155	40
Sunoco Inc.	829	3	715	114	524	—	—	570	256
Texaco Canada	2,261	10	—	—	—	—	—	1,698	563
Turbo Resources Ltd.	214	6	200	14	57	—	157	204	10
Ultramar Canada Inc.	865	3	865	—	391	—	—	—	—

(x) Did not respond.
(A) Would not provide figures.
(B) Formerly Top Valu Gasmarts.
(C) Did not respond—figures are for year-end 1983.

Brand Names of Gasoline and Motor Oils

Chevron Canada Ltd.

Gasoline	Motor Oil
Chevron (r,ur)	Chevron
Chevron Supreme (up)	

Esso Petroleum Canada

Gasoline	Motor Oil
Esso (r)	Esso Plus
Esso 2000 (ur)	Esso Extra Motor Oil
Esso Extra Unleaded (up)	Uniflo

Federated Co-operatives Ltd.

Gasoline	Motor Oil
Sonic (r,ur,up)	HD7
Co-op (d,o)	DMO
Agripower (r)	Multrex
	Sonic Premium

Gulf Canada Ltd.

Gasoline	Motor Oil
Gulf (r,ur,up)	Gulf

Husky Oil Marketing Company

Gasoline	Motor Oil
Husky (r,ur,up,d)	Husky Heavy Duty
	Husky Heavy Duty Special
	Husky Stratolube
	Husky Stratoplus

Mohawk Oil Co. Ltd.

Gasoline	Motor Oil
Mohawk (r,ur,up,d,o)	Mohawk Propane
Speedway (r,ur,up,d,o)	Mohawk Multigrade
Payless (r,ur,up,d,o)	Mohawk Premium
	Mohawk Heavy Duty Plus
	Duckhams
	Canadian Pride

Murphy Oil Co. Ltd.

Gasoline	Motor Oil
Spur (r,ur,up)	Spur
Gas (r,ur,up)	

Petro-Canada Products Inc.

Gasoline	Motor Oil
Petro-Canada (r,ur,up,d)	Heavy Duty
	Universal
	Multi Plus
	Multi

Shell Canada Ltd.

Gasoline	Motor Oil
Shell (r,ur,up)	Shell

Sunoco Inc.

Gasoline	Motor Oil
Sunoco Regular (r)	Dynalube
Sunoco ½&½ Leaded (r,up)	Sunfleet
Sunoco Premium Leaded (r,up)	Special
Sunoco Regular Unleaded (ur)	CAM2
Sunoco ½&½ Unleaded (ur,up)	
Sunoco Premium Unleaded (up)	
Pronto (r,ur,up)	

Sunys Petroleum Inc.

Gasoline	Motor Oil
Sunys (r,ur,p,d)	
Cansave (r,ur,p,d)	
Econobec (r,ur,p,d)	

Texaco Canada Ltd.

Gasoline	Motor Oil
Texaco (r,ur,up)	Havoline Supreme
	Havoline
	URSA Super Plus Multigrade
	URSA Super Plus Single-grade

Convenience Div./Loeb Inc. (formerly Top Valu Gasmarts)

Gasoline	Motor Oil
Top Valu (r,ur,p,d)	Top Valu

Turbo Resources Ltd.

Gasoline	Motor Oil
Premium No Lead (up)	Flo-Rite
Regular No Lead (ur)	Turbo
Regular Leaded (r)	Red Ram
Regular Purple	
Diesel Fuel Clear	
Diesel Fuel Purple	

Ultramar Canada Inc.

Gasoline	Motor Oil
Ultramar (r,ur,p,up)	Ultralube
Spur (r,ur,up)	Ultralube Mono-grade HD
Pipeline (r,ur,up)	Ultralube Super Multigrade
XL (r,ur,up)	Spur Multigrade
Arrow (r,ur,up)	Spur Supreme
	Castrol

KEY

Gasoline:

(r) Regular
(p) Premium
(ur) Unleaded
(up) Unleaded Premium

Motor Oils: Brand names are listed lowest-price grade first.

How Distribution is Organized

	BRANDED JOBBERS/COMMISSION AGENTS				BULK PLANTS				TERMINALS			
		SELLING . . .				COMPANY OPERATED . . .				COMPANY OPERATED . . .		
Full-serve/ Self-serve	Total	Gasoline only	Fuel Oil only	Gasoline and Fuel Oil	Total	Salary operated	Commission operated	Jobber operated	Total	Salary operated	Commission operated	Jobber operated
—	—	—	—	—	—	—	—	—	—	—	—	—
0	584	0	0	584	651	0	651	0	52	45	7	0
0	—	—	—	—	316	316	—	—	—	—	—	—
4	**500**	**0**	**0**	**500**	**584**	**84**	**279**	**221**	**55**	**45**	**10**	**0**
3	**30**	**—**	**—**	**30**	**—**	**—**	**—**	**30**	**1**	**1**	**—**	**—**
—	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**
—	—	37	—	—	—	—	—	—	—	—	—	—
6	27	27	—	—	—	—	—	2	—	—	—	—
4	268	0	3	265	155	10	136	9	19	18	1	0
0	**885**	**453**	**24**	**408**	**268**	**39**	**229**	**9**	**21**	**21**	**0**	**0**
0	**0**	**0**	**0**	**0**	**4**	**2**	**0**	**2**	**3**	**3**	**0**	**0**
—	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**
3	50	23	7	2	—	—	—	—	—	—	—	—
—	—	—	—	—	—	—	—	—	—	—	—	—
—	23	18	—	5	10	—	7	3	—	—	—	—
—	67	—	—	67	84	84	—	—	47	47	—	—

Branded Retail Outlets in Canada

Company	Total branded retail outlets	Number of Provinces	Newfoundland	Nova Scotia	New Brunswick	Quebec	Ontario	Prince Edward Island	Manitoba	Saskatchewan	Alberta	British Columbia
Chevron Canada Ltd.	(A)	1	—	—	—	—	—	—	—	—	—	(A)
Esso Petroleum Canada	3,431	10	191	193	166	581	883	36	237	348	376	420
Federated Co-Op. Ltd.	505	4	—	—	—	—	—	—	80	318	63	44
Gulf Canada Ltd. (C)	**2,487**	**10**	**57**	**72**	**42**	**510**	**503**	**8**	**227**	**344**	**404**	**296**
Husky Oil Ltd.	**317**	**5**	**—**	**—**	**—**	**—**	**55**	**—**	**29**	**35**	**111**	**87**
Irving Oil Ltd. (x)	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**	**—**
Loeb Inc. (B)	95	2	—	—	—	23	72	—	—	—	—	—
Mohawk Oil Co. Ltd.	354	5	—	—	—	—	3	—	24	37	204	86
Petro-Canada Prod. Inc.	2,497	10	11	135	87	856	1,018	13	34	37	121	185
Shell Canada Ltd. (C)	**3,433**	**10**	**—**	**114**	**129**	**830**	**1,161**	**31**	**302**	**216**	**303**	**343**
Spur Oil Ltd. (C) (Div. of Murphy Oil Co. Ltd.)	**141**	**2**	**—**	**—**	**—**	**136**	**5**	**—**	**—**	**—**	**—**	**—**
Sunys Petroleum Inc.	**195**	**2**	**—**	**—**	**—**	**26**	**169**	**—**	**—**	**—**	**—**	**—**
Sunoco Inc.	829	3	—	—	—	302	525	—	—	—	2	—
Texaco Canada	2,261	10	39	117	115	581	837	23	94	106	195	154
Turbo Resources Ltd.	214	5	—	—	—	—	1	—	11	50	120	30
Ultramar Canada Inc.	865	3	188	—	—	466	211	—	—	—	—	—

(x) Did not respond.
(A) Would not provide figure.
(B) Formerly Top Valu Gasmarts.
(C) Did not respond—figures are for year-end 1983.

Gasoline Shares by Key Categories—1984

This is a new study made public for the first time by MPSI Americas, Tulsa, Okla., which specializes in international computer software and information services as well as marketing research and planning.

It graphically portrays, on both a national and regional basis, market shares by orthodox service stations, by the big pumpers that focus their efforts on gasoline sales, by the convenience stores that also sell gasoline, and by the grab-bag category of "others," which includes car washes, garages and similar facilities where gasoline is secondary.

This study involves primarily the metropolitan areas of Canada, where most of the gasoline is marketed. It makes no attempt to count the rural vendors and the highway units which, while important to the industry, do not add materially to the overall consumption statistics.

Of significance is the fact that the service stations in these metropolitan areas average more than 172,000 liters (45,438 U.S. gal.) monthly. It also is interesting to note that pumpers in the selected metropolitan areas averaged 279,000 liters (73,704 U.S. gal.) monthly during 1984.

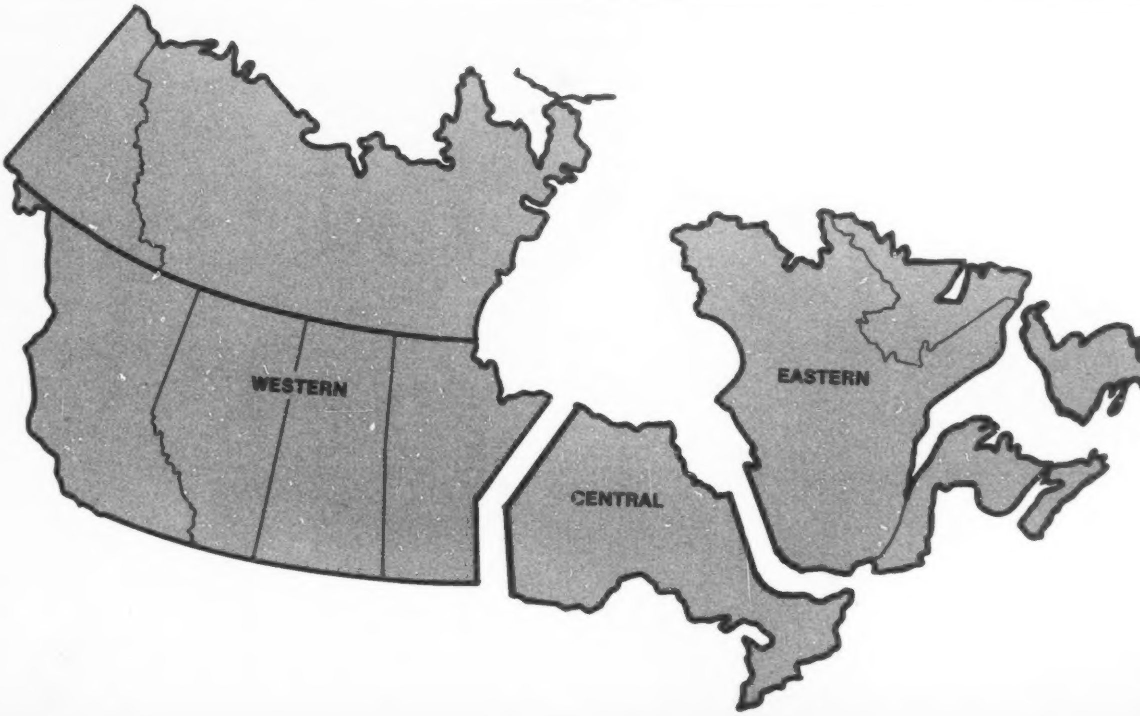
There are many interesting conclusions that can be drawn from the data. For example, in the eastern region, 47% of the gasoline was sold at service stations which also commanded 45% of the total volume in that region. Pumpers were a big factor too, with 21% of the outlets and 36% of the volume.

By way of contrast, service stations in the west represent 56% of the outlets and 58% of the volume. The big pumpers have 28% of the facilities and 34% of the gasoline volume.

Regional Gasoline Outlet Percentages

	Service Stations	Pumpers	Convenience Food Stores	Others	Total
Eastern Region					
• % of Outlets	46.6	20.7	5.7	27.0	100.0
• % of Volume	44.9	35.6	4.9	14.6	100.0
• Avg. Monthly Volume (Liters)(a)	135,736	242,458	121,367	75,181	140,558
Central Region					
• % of Outlets	57.0	26.0	0.7	16.3	100.0
• % of Volume	51.3	41.7	0.6	6.4	100.0
• Avg. Monthly Volume (Liters)	190,940	340,412	188,066	82,422	211,997
Western Region					
• % of Outlets	56.4	27.7	1.7	14.2	100.0
• % of Volume	58.9	34.4	1.3	5.4	100.0
• Avg. Monthly Volume (Liters)	202,824	241,890	149,762	74,811	194,479
Total Canada					
• % of Outlets	52.4	24.0	3.1	20.5	100.0
• % of Volume	51.0	37.8	2.3	8.9	100.0
• Avg. Monthly Volume (Liters)	172,616	279,164	130,491	77,133	177,346

(a) 3.7854 liters equal 1 American gal.; 4.5461 liters equal 1 Imperial gal., which is the conventional standard in Canada.
Source: MPSI Americas Inc., Tulsa, Okla.



Canadian Statistics

Motor Vehicle Registrations 1983

	Passenger Cars	Trucks	Buses	Motorcycles	Other	Total Vehicles
Newfoundland	133,585	59,087	—	6,793	—	199,465
Prince Edward Island	50,521	17,656	412	2,197	220	71,006
Nova Scotia	365,929	156,265	1,428	23,294	2,723	549,639
New Brunswick	259,866	105,710	347	11,640	11,895	389,458
Quebec	2,449,182	304,558	15,517	119,529	35,565	2,924,351
Ontario	3,900,384	1,119,753	24,601	131,606	5,610	5,181,954
Manitoba	478,194	191,194	133	18,704	725	688,950
Saskatchewan	381,934	295,171	4,469	12,122	676	694,372
Alberta	1,290,176	438,799	8,023	59,456	—	1,796,454
British Columbia	1,408,296	594,851	—	79,295	1,217	2,083,659
Yukon	6,821	11,393	165	732	—	19,111
Northwest Territories	6,632	13,309	131	1,043	75	21,190

Source: All tables courtesy of Statistics Canada

Automobiles Per Household 1984

Province	1 Auto	2 Autos	3+ Autos	0 Autos
Newfoundland	53.5%	10.9%	0.0%	35.5%
Prince Edward Island	61.5	20.5	0.0	17.9
Nova Scotia	58.0	16.5	2.7	22.7
New Brunswick	57.6	14.8	3.1	24.4
Quebec	57.4	14.1	2.0	26.4
Ontario	52.6	22.4	3.7	21.2
Manitoba	55.1	18.2	4.2	22.4
Saskatchewan	56.6	18.0	4.5	20.8
Alberta	55.7	20.5	4.8	18.9
British Columbia	55.1	19.5	3.5	21.8
Total	**55.1**	**18.7**	**3.3**	**22.8**

Note: Data from a sample survey.

New Motor Vehicle Sales

Year	Total	Passenger cars	Commercial vehicles
1984	1,283,502	971,210	312,292
1983	1,081,088	843,318	237,770
1982	920,902	713,481	207,421

(1) Excludes Japanese and North American manufactured vehicles.

Factory Sales of Auto Batteries

	1984	$	1983	$
Orig. equip.	confidential	—	confidential	—
Replacement	2,940,626	103,157,892	2,695,969	94,487,362
Heavy-duty transport, motor coach, bus, diesel starting batteries, for replacement	443,301	21,390,620	405,742	19,476,813

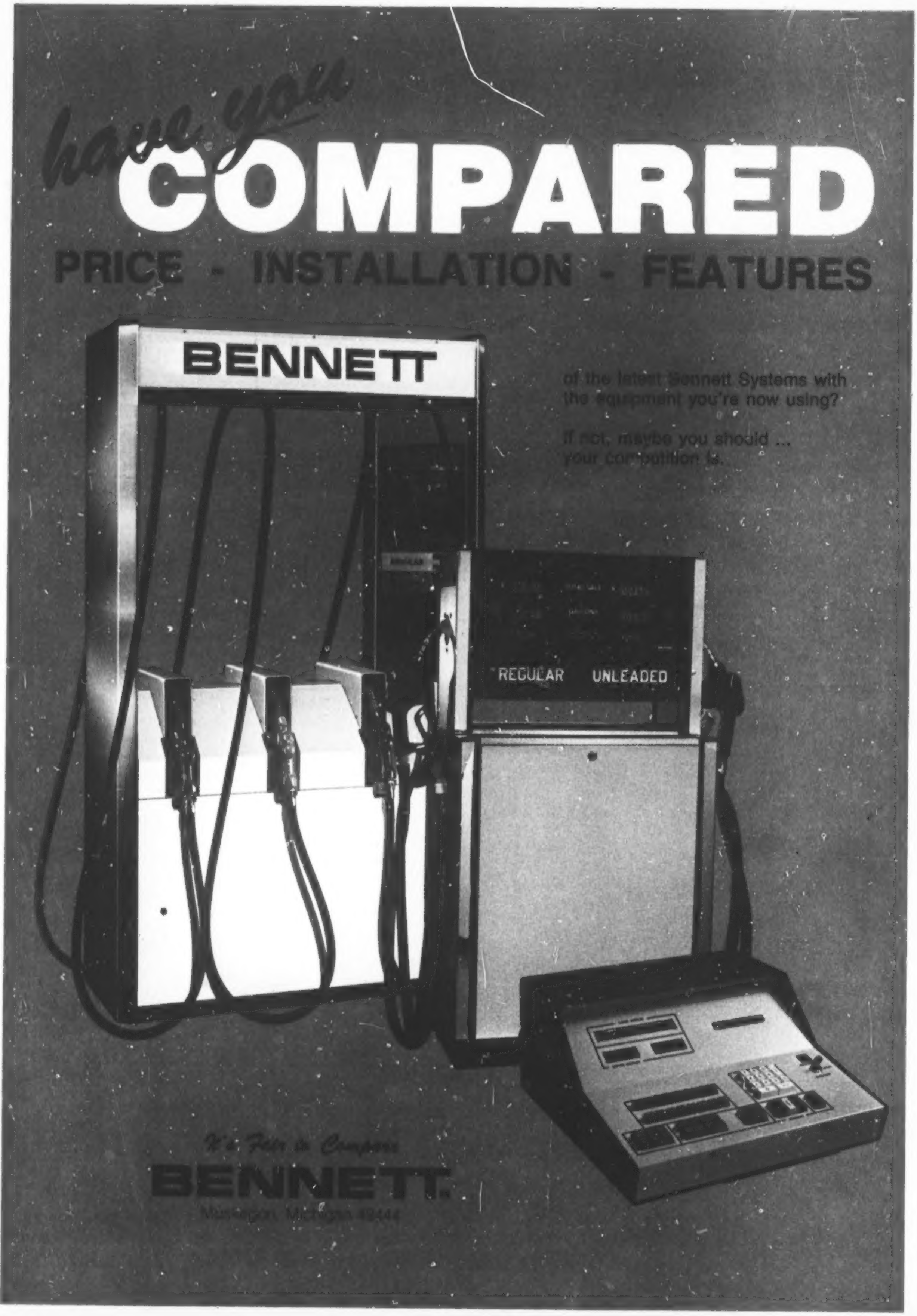
Drivers Licenses 1983

Province	Drivers
Newfoundland	296,000
Prince Edward Island	27,985
Nova Scotia	520,586
New Brunswick	390,820
Quebec	3,610,646
Ontario	5,380,286
Manitoba	595,952
Saskatchewan	633,893
Alberta	1,717,087
British Columbia	2,158,739
Yukon	16,500
Northwest Territories	18,078
Total	**15,366,572**

Heating Fuels in 1984

	(000 Households)						
	Oil	Piped Gas	Bottled Gas	Electricity	Other*	Wood	Total Households
Newfoundland	66	—	—	55	—	38	159
Prince Edward Island	31	—	—	—	—	9	40
Nova Scotia	205	—	4	32	9	43	292
New Brunswick	108	—	—	67	—	52	229
Quebec	805	196	NA	1,214	—	104	2,324
Ontario	710	1,828	15	520	—	106	3,179
Manitoba	35	223	—	105	—	14	379
Saskatchewan	53	268	7	14	—	12	355
Alberta	12	779	18	6	5	5	824
British Columbia	214	555	9	212	—	84	1,075
Total	**2,240**	**3,850**	**62**	**2,224**	**15**	**468**	**8,857**

Note: Data from a sample survey only.
*"Other" includes Coal and Coke.



BENNETT
REGULAR
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Muskegon, Michigan 49444

LPG Sales Trend

Major Domestic Markets (Add 000,000 gal.)

Year	Total U.S. sales		Residential-commercial		Chemical		Internal combustion		Industrial		All other uses	
	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change	Vol.	% Change
1984 (a)	20,419	4.4%	(See special note below)									
1983 (a)	19,558	0.6										
1982	19,441	−6.5	4,047	−4.3%	9,679	−7.3%	644	16.2%	2,095	0.6%	2,976	−15.2%
1981	20,803	8.3	4,217	−11.5	10,438	27.9	554	24.8	2,083	−1.0	3,511	−5.8
1980	18,604	−3.1	4,373	−8.2	7,808	−4.3	508	14.4	2,217	5.3	3,698	−1.0
1979	19,202	27.8	4,764	−31.5	8,160	129.0	444	−55.3	2,105	57.1	3,728	71.6
1978	15,023	−3.1	6,954	−3.0	3,563	−0.4	993	−13.3	1,340	28.4	2,172	−15.6
1977	15,508	−3.2	7,169	−2.0	3,578	−12.4	1,145	−2.1	1,054	—	2,573	7.5
1976	16,013	5.3	7,313	4.2	4,085	−2.1	1,170	—	1,052	−2.8	2,394	35.8
1975	15,200	−6.8	7,020	−2.9	4,172	−23.0	1,162	−11.3	1,082	1.2	1,763	38.3
1974	16,306	−5.0	7,231	−7.8	5,422	−9.0	1,310	−7.0	1,069	2.4	1,275	46.2
1973	17,812	−1.1	7,846	−5.0	5,960	1.0	1,409	−4.7	1,095	−2.3	872	41.1
1972	17,373	12.1	8,253	7.6	5,898	15.1	1,479	11.7	1,124	23.7	618	30.7
1971	15,498	1.5	7,668	1.3	5,124	2.4	1,324	—	909	1.3	473	1.3
1970	15,271	26.6	7,569	41.6	5,003	24.8	1,336	11.9	897	32.1	467	125.6
1965	11,434	33.7	5,346	26.5	4,008	54.6	1,194	33.0	679	13.9	207	−23.0
1960	8,579	40.1	4,225	50.8	2,593	36.5	898	37.7	596	13.7	269	9.3
1955	6,123	75.8	2,801	38.5	1,899	122.6	652	401.5	524	241.6	246	−7.7
1950	3,433	--	2,022	—	853	—	130	—	217	—	260	—

(a) Estimated by *NPN* on basis of Energy Information Administration charts and data.

Special note: Energy Information Administration suddenly discontinued the collection of the basic data on LPG end-use sales in 1984, citing budget retrenchments imposed by the Administration. Thus, no 1983 end-use data was available in May 1985. American Petroleum Institute, in cooperation with Liquefied Petroleum Gas Assn. and others, began collecting the LPG data in early 1985 for the year 1984, but did not expect to have it available much before mid-summer, and then mostly in tentative form.

Source: For data 1950 through 1982, Energy Information Administration, Petroleum Supply Annual, 1983; for 1983 and 1984, estimates by *NPN*.

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So fight back against heart disease. Quit smoking. For more information on how you can stop smoking contact the American Heart Association.

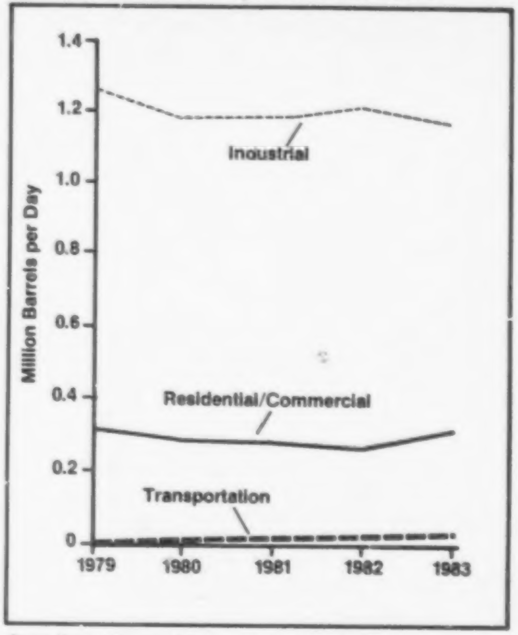
LPG Consumption Rises 4% in 1984 to Near-Record Level

Consumption of liquefied petroleum gases increased 4% in 1984, almost equalling the peak period of 1.6-million b/d set in 1979, the Energy Information Administration says. During the intervening years—1979 to 1984—consumption averaged around 1.5-million b/d.

There are no specific figures available for 1983 or 1984, however, because EIA discontinued the collection of LPG data unexpectedly in 1984 due to budgetary retrenchments. The American Petroleum Institute, Liquefied Petroleum Gas Assn. and others picked up the dropped ball in early 1985, but their numbers were not expected to be available until sometime this summer. Meantime, EIA's graph (right) was based on data collected by its State Energy Data System.

About 80% of the consumption of LPG is in the industrial sector, primarily as a feedstock in the petrochemical industry. Most of the remainder is used in residential and commercial applications. A very small but growing portion is used in transportation, where the clean-burning properties of LPG provide longer engine life and reduced maintenance costs, lower emissions and less engine noise.

LPG Consumption by End-Use Sector

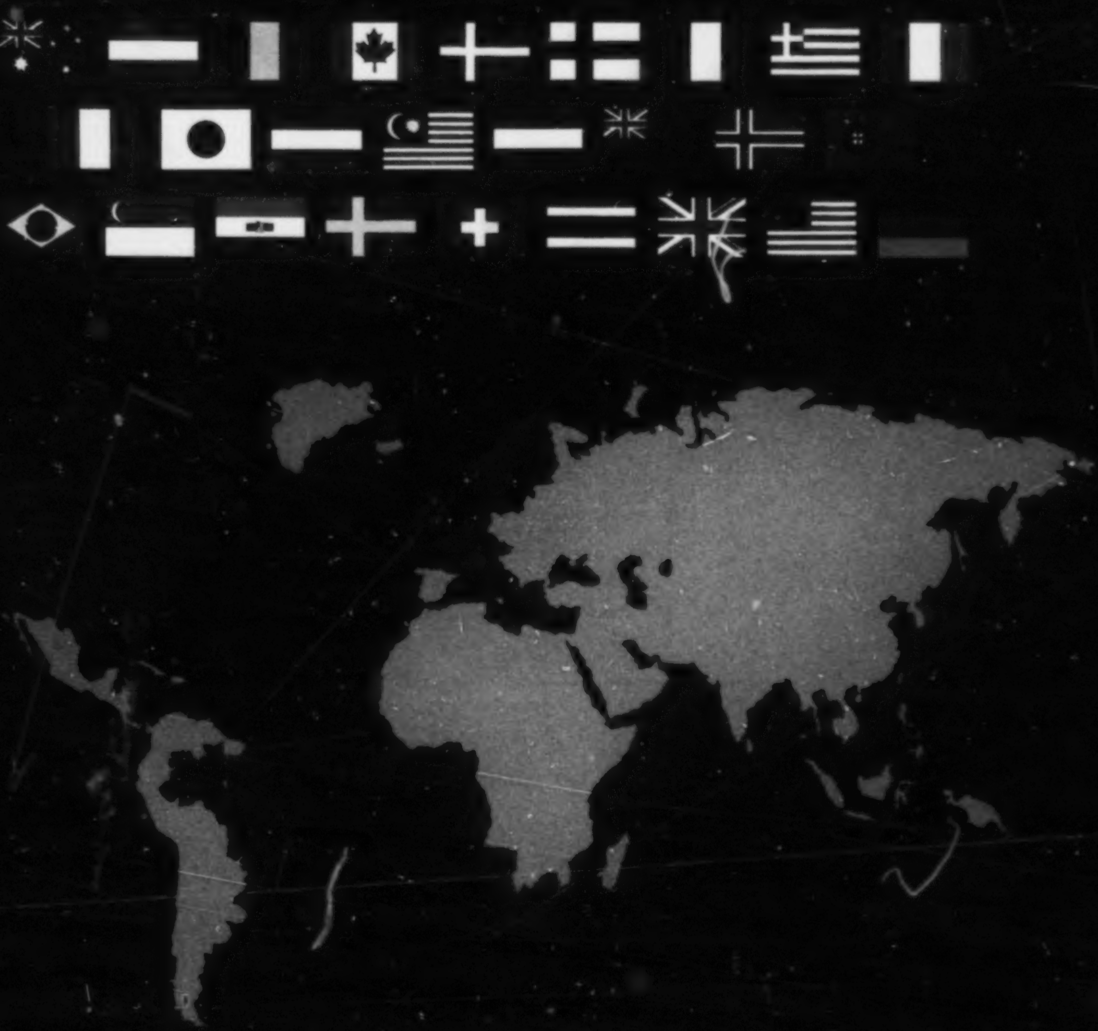


Source: Energy Information Administration, State Energy Data System

LPG Supply and Disposition 1974-1984

	Supply			Disposition			Ending Stocks
	Total Production	Imports	Stock Withdrawal	Refinery Inputs	Exports	Products Supplied	
	(Add 000 b/d)						(Million bbl.)
1974 Average	1,565	123	−38	220	25	1,406	113(a)
1975 Average	1,527	112	−35(a)	246	26	1,333	125
1976 Average	1,535	130	24	260	25	1,404	116
1977 Average	1,566	161	−55	233	18	1,422	138
1978 Average	1,537	123	12	239	20	1,413	132
1979 Average	1,556	217	70	236	15	1,592	111
1980 Average	1,535	216	−27	233	21	1,469	120(a)
1981 Average	1,571	244	−18(a)	289	42	1,488	135
1982 Average	1,528	226	111	300	65	1,499	94(a)
1983 January	1,611	240	520(a)	313	118	1,939	86
February	1,600	305	128	244	76	1,713	82
March	1,543	166	−9	197	127	1,377	82
April	1,607	124	−156	198	116	1,260	87
May	1,613	167	−225	207	84	1,263	94
June	1,664	172	−334	203	59	1,241	104
July	1,656	191	−221	217	55	1,354	111
August	1,586	160	−199	229	29	1,289	117
September	1,705	178	−30	236	86	1,531	118
October	1,688	160	−81	268	32	1,467	120
November	1,785	180	70	362	33	1,640	118
December	1,645	247	575	363	66	2,038	101(a)
Average	**1,642**	**190**	**4**	**253**	**73**	**1,509**	
1984 January	1,610	269	470(a)	333	23	1,993	93
February	1,690	237	146	323	41	1,708	89
March	1,685	241	12	289	68	1,581	89
April	1,711	155	−170	253	54	1,389	94
May	1,709	211	−221	244	42	1,412	101
June	1,714	158	−189	237	53	1,394	106
July	1,750	132	−138	232	43	1,469	111
August	1,744	154	−132	241	34	1,491	115
September	1,704	128	−24	283	26	1,499	115
October	1,683	207	137	322	56	1,648	111
November	1,719	212	90	376	52	1,593	108
December	1,681	237	241	351	82	1,727	101
Average	**1,700**	**195**	**19**	**291**	**48**	**1,576**	

(a) In January of 1975, 1981, 1983 and 1984, a new stock basis was established which affected withdrawals and ending stocks.
Source: Petroleum Supply Monthly, Energy Information Administration, January 1985 (March).



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Tonight, as you sleep,

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Motor Oil Trends in 1984: An Overview

As they have been through the years, do-it-yourselfers were again the principal purchasers of motor oils in 1984. The year-end survey by NPD Auto-Facts, Houston, Texas, confirms that seven out of 10 quarts of motor oil were purchased for off-premises use.

A note of interest—but certainly not of concern at this point in time—was the erosion for the second consecutive year in share-of-purchases by the do-it-yourselfers. In 1982, for example, they accounted for 71%. In 1983, they dropped to 70%. The 1984 survey showed they dropped again, this time to 69%. This put them back to their 1980 level of purchases.

Mass merchandisers, with by far the best prices for motor oils, continued to be the leading distributors. The average retail price in 1984 was $1.06 per quart for the second consecutive year. By way of comparison, service stations averaged $1.73 a quart, up 8¢ over 1983 which, in itself, was up 6¢ over the preceding year. Other traditional outlets, such as car dealers, garages and auto supply stores, moved their motor oils at an average $1.20 per quart, down 10¢ from 1983.

The average family in the NPD survey spent $15.76 on motor oils in 1984, the same as the year before. The average family also used a bit less motor oil in 1984—about a half-quart. This factor has been decreasing right along, probably reflecting better quality and longer-life motor oils which require fewer make-up additions and generally extend change intervals.

Service stations continued to lose ground in 1984 as a source of motor oil purchases. The NPD Survey shows that the service station share of market declined to 16% in 1984, down 2% from 1983 and 5% from 1982. Picking up their "lost" business were car dealers, auto supply stores, garages and tire stores, whose share rose from 20% in 1982 to 23% in 1983 and to 26% in 1984.

NPD Auto-Facts has been using a diary track methodology in its surveys and the figures reflect purchases by family households. NPD said the diary panel study, however, was discontinued at the end of 1984. It had been in operation since 1978. NPD has several other ongoing motor oil surveys available, including its Automotive Oils Index which tracks consumer purchasing behavior in the marketplace.

NPD Auto-Facts, which has offices in Houston, New York, Chicago and Los Angeles, estimates that families purchase 50% to 60% of the motor oil bought for passenger cars and light trucks.

The Market Share Battle

Retail Segment	Avg. Retail Price 1984	Avg. Retail Price 1983	Primary Market	Market Shares 1984	Market Shares 1983
Mass Merchandisers (discount stores, department stores, supermarkets, drug stores and others)	$1.06	$1.06	DIY (a)	58%	59%
Service Stations	1.73	1.65	Reliers (b)	16	18
Other Traditional Outlets (car dealers, auto supply stores, garages and tire stores)	1.20	1.30	Reliers & DIY	26	23
Total Industry	$1.21	$1.21			

(a) Do-it-yourselfers accounted for 70% of the motor oil purchases in 1983; (b) Motorists who rely on service stations, car dealers, etc., to change their oil.

The Channels of Distribution (a)

	1984	1983	1982	1981	1980
Service Stations	NA	NA	20.8%	23.4%	25.7%
Discount Stores	NA	NA	30.1	29.2	29.3
Department Stores	NA	NA	10.0	7.6	8.2
Supermarket/Drug Stores	NA	NA	9.2	9.3	8.6
Others	NA	NA	10.1	11.3	10.1
Auto Supply Stores	NA	NA	9.8	10.5	9.7
Tire Store/Garages	NA	NA	5.2	4.3	5.3
Car Dealers	NA	NA	4.8	4.4	3.1

(a) By quarts by place of purchase

How the Oil Is Used

	1984	1983	1982	1981	1980
Oil Change	53%	49%	48%	46%	45%
Add Oil	15	17	18	20	20
Future Use	14	15	13	14	16
Duplicate Use	18	19	21	20	19

Who Buys the Most of It

	1984	1983	1982	1981	1980
Carried Out by Purchaser (installed at some other place (a)	69%	70%	71%	70%	69%
Installed Where Bought (b)	31	30	29	30	31

(a) Generally considered to be the do-it-yourselfer. (b) generally considered to be the "relier," i.e. depending on service man for performance.

Dollars Spent per Average Family

	1984	1983	1982	1981	1980
Dollars Spent	$15.76	$15.76	$16.56	$17.10	$16.91
Average Price Paid per Quart	1.17	1.21	1.22	1.17	1.08
Average Quarts per Transaction	4.92	4.30	4.10	4.10	4.40
Annual Quarts Purchased	13.50	13.00	13.60	14.70	15.70

Source: Diary Panel Index (NPD-Auto-Facts) April 1985.

Lube Oil Sales Projections

U.S. Demand for Automotive Base Oils

Year	Engine Oils	Hydraulic Oils	Other Lubes	Total	Total
	(Add 000,000 gal.)				(Add 000,000 bbl.)
1995	1,002	196	50	1,250	29.8
1990	973	189	48	1,210	28.8
1985	981	179	47	1,207	28.7
1984	984	176	46	1,206	28.7
1983	933	172	44	1,149	27.4

Source: Jon S. Helman, Sun Refining & Marketing Co., May 1985.

U.S. Demand for Lubricating Base Oils

(Add 000,000 bbl.)

Year	Total	Automotive Lubes	Industrial Oils	Process Oils	Losses/ Minor Products
1995	62.1	29.8	19.8	8.9	3.6
1990	59.9	28.8	19.1	8.5	3.5
1985	54.9	28.7	16.4	6.5	3.3
1984	56.6	28.7	17.4	7.1	3.4
1983	53.4	27.4	16.3	6.7	3.0

Source: Jon S. Helman, Sun Refining & Marketing Co., May 1985.

Past and Projected Demand for Finished Lubes

(Millions of gal.)

Automotive Oils	1983	1984	1985	1990	1995
Engine Oils	1,060	1,118	1,115	1,106	1,138
Hydraulic Oils	195	200	202	215	225
Gear Oils	50	52	53	54	57
Total Automotive ..	**1,305**	**1,370**	**1,370**	**1,375**	**1,420**

(Millions of gal.)

Industrial Oils	1983	1984	1985	1990	1995
General Lubricants ...	410	450	420	495	515
Metalworking Oils	168	180	170	190	195
Industrial Engine Oils ..	132	135	130	155	160
Process Oils	285	300	275	355	375
Total Industrial	**995**	**1,065**	**995**	**1,195**	**1,245**

Total Lubricants... 1983—2,300 1984—2,435 1985—2,365 1990—2,570 1995—2,665

Source: Jon S. Helman, Sun Refining & Marketing Co., May 1985.

Automotive Sales

(Add 000 gal.)

	1982	1983
SAE J-193a, Engine Oils		
Monograded..................................	425,813	426,128
Multi-graded..................................	531,165	592,343
Sub Total..................................	**956,978**	**1,018,470**
NON SAE J-183a, Engine Oils		
Aircraft..................................	9,227	9,008
Gasoline Fueled Two-stroke..................	11,736	12,975
Sub Total..................................	**20,963**	**21,983**
Transmission and Hydraulic Fluids		
Automatic Trans. Fluids......................	126,800	131,066
Universal Tractor Fluids, HYD/Trans.	43,211	44,794
Shock Absorber/Steering Fluid................	8,108	9,662
Other (Manual Trans., etc.)..................	2,850	3,640
Sub Total..................................	**180,969**	**189,162**
Gear Lubricants		
GL-4 Less..................................	4,533	5,014
GL-5 and GL-6	40,173	43,530
Sub Total..................................	**44,706**	**48,544**
Total Automotive..........................	**1,203,616**	**1,278,159**

Source: National Petroleum Refiners Assn. (NPRA) *"1983 Report on U.S. Lubricating Oil Sales"*

Industrial Sales

(Add 000 gal.)

	1982	1983
General Industrial Lubricants		
Hydraulic Oils..................................	179,936	185,624
Gear Oils	32,337	33,552
Other Specified	118,822	127,687
Other Unspecified............................	1,214	2,227
Sub Total..................................	**332,309**	**349,094**
Industrial Engine Oils		
Railroad Diesel	50,043	51,925
Marine..................................	42,691	41,040
Natural Gas	41,221	38,615
Sub Total..................................	**133,955**	**131,580**
Metalworking		
Specified..................................	74,813	82,772
Unspecified..................................	2,495	1,029
Sub Total..................................	**77,308**	**83,801**
Process Oils		
Specified..................................	251,016	272,198
Total Industrial..............................	**794,588**	**836,673**

Source: National Petroleum Refiners Assn. (NPRA) *"1983 Report on U.S. Lubricating Oil Sales"*

Total Industrial & Automotive Lube Sales

(Add 000 gal.)

	1981	1982	1983
Total Industrial Lube Sales	942,318	794,588	836,673
Total Automotive Lube Sales	1,240,040	1,203,616	1,278,159
GRAND TOTAL..........................	**2,182,358**	**1,998,204**	**2,114,832**

Source: National Petroleum Refiners Assn. *"1983 Report on U.S. Lubricating Oil Sales"*

R.I.P.

Be honest. What you'd like to do with an underground petroleum tank is bury it and forget it.

No hassles. No maintenance expenses. Definitely, *no leaks*.

And the ability of Fiberglas* tanks to rest in peace because they *can't rust* has always been their main advantage over steel tanks, which can rust.

Now new legislation has made Fiberglas tanks an even more obvious choice—and value—compared to steel.

NEW LAW

Because of national concern over leaking underground tanks, Federal law now prohibits burial of bare steel tanks in most parts of the country. This, in effect, narrows your choice to fiber glass tanks and two types of "protected" steel tanks.

Cathodically protected steel tanks should be regularly *monitored* to ensure that the protection system is working. The other type of protected steel tank has a non-corrosive coating that requires utmost care in handling. Even microscopic pinholes or scratches can invite rust.

Danger lurks inside steel tanks, too. Water from condensation can cause rust and, eventually, require tank replacement or relining.

Fiberglas tanks simply can't rust—inside or out. That's why Owens-Corning petroleum tanks carry a *30-year* limited warranty against external and internal corrosion. *This warranty also applies for storage of gasohol (10% ethanol) and gasoline blended with Oxinol-50* (4.75% methanol and 4.75% GTBA).*

The simplicity and life-cycle economy of fiber glass tanks have made them the overwhelming choice of major oil companies. And Owens-Corning, the pioneer of glass-fiber technology, has now become the world's largest manufacturer of underground tanks. With over 100,000 Owens-Corning petroleum storage tanks buried, there has never been one leak due to rust!

FIBERGLAS VS. PROTECTED STEEL
Recommended steps for installation and maintenance

FIBERGLAS®	CATHODICALLY PROTECTED STEEL
1. Install with required gravel backfill.	1. Test soil corrosiveness to assure tank warranty applies.
	2. Check anode connection in OSHA-approved hole.
	3. Check dielectric bushings on piping/fitting connections.
	4. Install with proper compaction of backfill.
	5. Install equipment to detect when anodes are operating or sacrificed.
	6. Replace sacrificial anodes when necessary.

OWENS/CORNING
FIBERGLAS

CALL OWENS-CORNING BEFORE YOU BUY

Purchasing an underground petroleum storage tank in today's environment is a major decision. No longer can this decision be made solely on initial cost. So take time now to consult with an Owens-Corning representative, and prevent unnecessary costs in the future. Our rep will tell you about our broad product line and responsive service. He'll also give you more information on the performance and price of Owens-Corning tanks.

Send for our catalog (Non-corrosive Products Division, Owens-Corning Fiberglas Corporation, Toledo, Ohio 43659) or call 800-537-4730 now. Then *you'll* rest easier.

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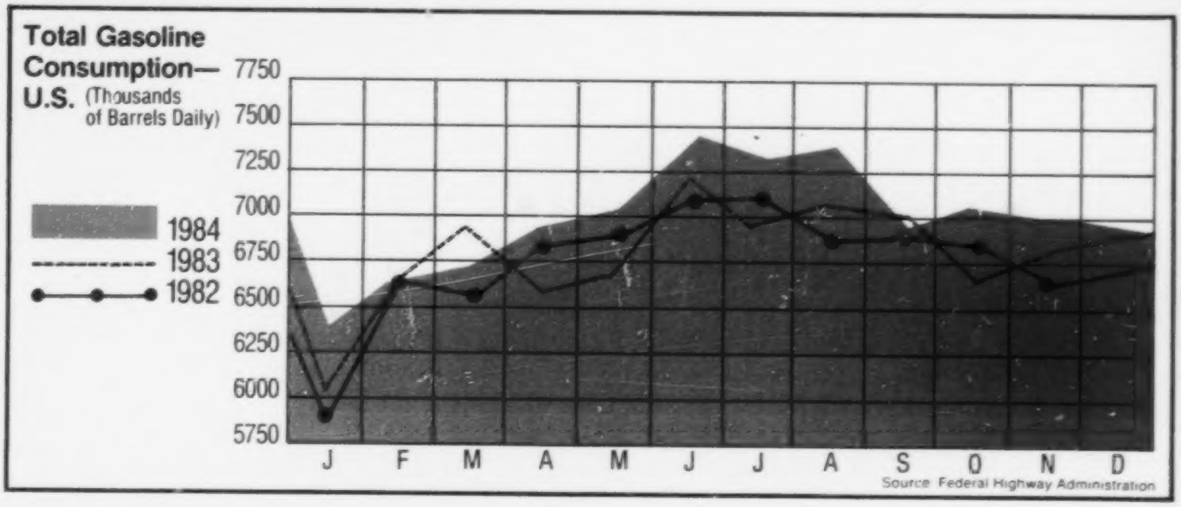


Source: Federal Highway Administration

Gasoline Consumption by States

(includes on-highway and off-highway consumption)

	1984 Rank	Total Gasoline (a) (Add 000 gal.) 1984	Total Gasoline (a) (Add 000 gal.) 1983	Total Gasoline (a) % Chng. '84 v. '83	Gasohol Included (b) (Add 000 gal.) 1984	Gasohol Included (b) (Add 000 gal.) 1983
Alabama	22	1,905,267	1,861,406	2.4%	34,899	29,637
Alaska	50	248,993	221,209	12.5	—	—
Arizona	27	1,505,607	1,410,904	6.7	—	772
Arkansas	32	1,193,067	1,128,357	5.7	28,671	12,631
California	1	11,413,578	11,032,662	3.5	401,837	480,850
Colorado	26	1,531,728	1,560,776	(1.9)	62,837	56,562
Connecticut	29	1,372,038	1,308,077	4.9	5,421	1,476
Delaware	48	320,246	308,772	3.7	—	—
Dist. of Col.	51	183,613	168,019	9.3	63	52
Florida	4	5,261,728	5,078,234	3.6	508,751	357,232
Georgia	10	3,092,597	2,904,369	6.5	16	158
Hawaii	46	371,084	335,332	4.4	—	—
Idaho	41	459,144	459,377	—	6,658	8,747
Illinois	6	4,677,169	4,609,320	1.5	263,127	240,000
Indiana	12	2,906,333	2,479,277	17.2	483,063	525,076
Iowa	28	1,398,174	1,394,722	0.2	457,228	510,206
Kansas	30	1,264,521	1,240,248	2.0	249,296	67,396
Kentucky	24	1,764,566	1,734,296	1.7	328,238	100,646
Louisiana	17	2,166,617	2,151,035	0.7	24,424	—
Maine	38	530,799	519,891	2.1	—	—
Maryland	21	1,959,267	1,892,434	3.5	62	74
Massachusetts	16	2,340,189	2,266,746	3.2	—	56
Michigan	7	4,042,347	3,680,884	9.8	577,723	565,991
Minnesota	18	2,084,655	1,985,492	5.0	2,707	3,578
Mississippi	33	1,191,027	1,158,134	2.8	—	—
Missouri	14	2,587,350	2,536,042	2.0	—	6,996
Montana	40	474,004	459,851	3.1	8,303	11,326
Nebraska	36	780,071	776,930	0.4	208,455	183,345
Nevada	39	504,529	489,835	3.0	—	283
New Hampshire	42	434,424	405,203	7.2	—	—
New Jersey	9	3,358,176	3,371,871	(0.4)	—	—
New Mexico	37	764,798	740,916	3.2	56,494	26,589
New York	3	6,261,510	5,491,074	14.0	—	—
North Carolina	11	3,042,021	2,911,221	4.5	34,037	2,912
North Dakota	44	390,514	390,085	0.1	5,469	4,440
Ohio	5	4,877,793	4,634,793	5.2	399,988	489,292
Oklahoma	23	1,877,792	1,907,622	(1.6)	23,620	75,704
Oregon	31	1,263,213	1,222,903	3.3	298	1,130
Pennsylvania	8	4,036,989	4,370,547	(0.1)	—	—
Rhode Island	45	378,252	365,634	3.5	—	—
South Carolina	25	1,599,698	1,538,188	3.9	154	1,018
South Dakota	43	399,875	389,287	2.7	37,850	31,947
Tennessee	15	2,346,990	2,331,655	0.7	109,762	—
Texas	2	8,501,979	8,393,680	1.3	207,152	282,091
Utah	34	881,906	725,317	21.6	25,862	—
Vermont	49	252,093	242,056	4.1	—	—
Virginia	13	2,665,515	2,554,245	4.4	131,618	46,213
Washington	20	2,000,333	1,919,152	4.2	9,143	7,943
West Virginia	35	800,672	801,736	(0.1)	—	—
Wisconsin	19	2,022,610	2,011,843	0.5	1,962	1,046
Wyoming	47	358,076	338,752	5.7	288	202
Total U.S.		**108,045,537**	**104,231,431**	**3.7**	**4,695,230**	**4,133,857**

(a) These totals reflect the gross gal. of gasoline reported for tax purposes by wholesale distributors in each state. The data includes highway and non-highway uses and losses. Gasohol data also is included.

(b) These totals show gross gal. of gasohol (ethanol blends) reported by distributors in each state. However this total should not be considered as a national total because in states where gasohol is taxed at the same rate as gasoline, the gallonage data is not reported separately; in other states, partial tax exemptions may have been legislated, but the reporting systems have not been converted for separate reporting.

Source: Federal Highway Administration, Monthly Gasoline Reports, 1984.

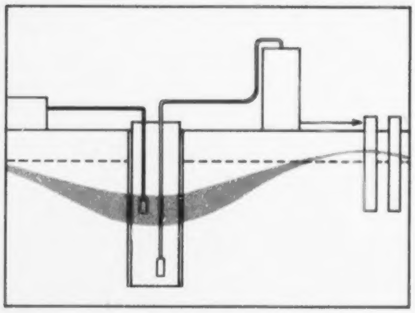
State Gasoline Consumption by Rank

State	1984 Rank	1983 Rank	(Add 000) 1984 Gallonage
California	1	1	11,413,578
Texas	2	2	8,501,979
New York	3	3	6,261,510
Florida	4	4	5,261,728
Ohio	5	5	4,877,793
Illinois	6	6	4,679,169
Michigan	7	8	4,042,347
Pennsylvania	8	7	4,036,989
New Jersey	9	9	3,518,176
Georgia	10	11	3,092,597
North Carolina	11	10	3,042,021
Indiana	12	14	2,906,433
Virginia	13	12	2,665,515
Missouri	14	13	2,587,350
Tennessee	15	15	2,346,990
Massachusetts	16	16	2,340,189
Louisiana	17	17	2,166,617
Minnesota	18	19	2,084,655
Wisconsin	19	18	2,022,610
Washington	20	20	2,000,333
Maryland	21	22	1,959,267
Alabama	22	23	1,905,267
Oklahoma	23	21	1,877,792
Kentucky	24	24	1,764,566
South Carolina	25	26	1,599,698
Colorado	26	25	1,531,728
Arizona	27	27	1,505,607
Iowa	28	28	1,398,174
Connecticut	29	29	1,372,038
Kansas	30	30	1,264,521
Oregon	31	31	1,263,213
Arkansas	32	33	1,193,067
Mississippi	33	32	1,191,027
Utah	34	37	881,906
West Virginia	35	34	800,672
Nebraska	36	35	780,071
New Mexico	37	36	764,798
Maine	38	38	530,799
Nevada	39	39	504,529
Montana	40	40	474,004
Idaho	41	41	459,314
New Hampshire	42	44	434,424
South Dakota	43	42	399,875
North Dakota	44	43	390,514
Rhode Island	45	45	378,252
Hawaii	46	46	371,084
Wyoming	47	47	358,076
Delaware	48	48	320,246
Vermont	49	49	252,093
Alaska	50	50	248,993
District of Columbia	51	51	183,613

Source: Federal Highway Administration, Monthly Reports.

Source: Federal Highway Administration, Monthly Reports.

Underground leak problems??



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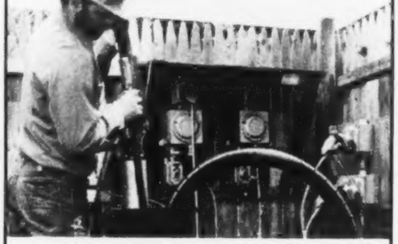

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Gasoline Octanes, U.S. Service Stations

Year	Season	Regular grade (1) Rsh.	Regular grade (1) Mtr.	Regular grade (1) (R + M)* / 2	Premium grade(2) Rsh.	Premium grade(2) Mtr.	Premium grade(2) (R + M)* / 2	Unleaded grade Rsh.	Unleaded grade Mtr.	Unleaded grade (R + M)* / 2
1984	Summer	92.9	85.0	89.0	—	—	—	91.6(a) 96.5(b)	82.9(a) 86.9(b)	87.3(a) 91.7(b)
1983-84	Winter	92.7	84.9	88.8	—	—	—	91.7(a) 96.1(b)	82.9(a) 86.6(b)	87.3(a) 91.3(b)
1983	Summer	93.1	84.9	89.0	—	—	—	92.0(a) 96.2(b)	82.9(a) 86.5(b)	87.5(a) 91.4(b)
1982-83	Winter	92.9	85.2	89.1	—	—	—	91.7(a) 96.3(b)	82.9(a) 86.7(b)	87.3(a) 91.5(b)
1982	Summer	93.0	85.0	89.0	—	—	—	91.9(a) 96.8(b)	82.8(a) 86.6(b)	87.3(a) 91.7(b)
1981-82	Winter	92.7	85.1	88.9	98.1	87.8	93.0	91.8(a) 96.6(b)	82.9(a) 86.8(b)	87.4(a) 91.7(b)
1981	Summer	92.8	85.1	89.0	—	—	—	91.9(a) 96.3(b)	83.0(a) 86.2(b)	87.4(a) 91.3(b)
1980-81	Winter	92.8	85.4	89.1	97.3	89.2	93.3	91.9(a) 96.1(b)	83.3(a) 86.5(b)	87.6(a) 91.4(b)
1980	Summer	96.2	85.2	88.9	97.0	88.6	92.8	92.1(a) 96.1(b)	83.4(a) 86.4(b)	87.8(a) 91.6(b)
1979-80	Winter	92.5	85.5	89.0	97.2	89.3	93.2	92.1(a) 97.1(b)	83.7(a) 87.0(b)	87.9(a) 92.1(b)
1979	Summer	92.8	85.7	89.3	97.6	89.8	93.7	93.0	84.1	88.6
1978-79	Winter	93.2	85.9	89.6	98.0	90.3	94.2	93.1	84.3	88.7
1978	Summer	93.2	85.7	89.5	98.2	90.4	94.3	93.0	83.9	88.5
1977-78	Winter	93.2	85.7	89.5	98.8	91.0	94.9	92.9	83.9	88.4
1977	Summer	93.2	85.9	89.6	98.7	91.2	95.0	92.9	83.9	88.5
1976-77	Winter	93.2	86.1	89.7	98.8	91.4	95.1	92.6	84.1	88.4
1976	Summer	93.3	86.0	89.5	98.9	91.4	95.2	92.4	83.9	88.2
1975-76	Winter	93.4	86.0	89.7	98.9	91.4	95.2	92.3	84.0	88.2
1975	Summer	93.4	86.0	89.7	98.9	91.4	95.2	92.1	83.9	88.0
1974-75	Winter	93.4	86.1	89.9	98.9	91.6	95.3	92.3	84.0	88.2

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*Antiknock index.

(1) Below 93.0 octane; (2) 93.0 octane and above.

(a) Unleaded below 90. (b) Unleaded 90 and above.

Source: Motor Gasolines, Summer 1984—National Institute for Petroleum and Energy Research, Bartlesville, Okla., February 1985.

Gasoline Octanes, Regional Averages

	Unleaded Octane Number						Leaded Octane Number					
	Index Below 90			Index Above 90			Index Below 93			Index Above 93 (a)		
	Rsch.	Mtr.	(R + M) ÷ 2	Rsch.	Mtr.	(R + M) ÷ 2	Rsch.	Mtr.	(R + M) ÷ 2	Rsch.	Mtr.	(R + M) ÷ 2
Northeast	92.5	82.8	87.6	96.6	86.9	91.8	93.4	85.1	89.2	—	—	—
Mid-Atlantic Coast	92.2	82.6	87.4	97.2	86.7	92.0	93.2	85.3	89.3	—	—	—
Southeast	91.7	82.8	87.3	96.9	86.8	91.9	93.1	85.5	89.4	—	—	—
Appalachian	91.7	82.9	87.4	96.3	87.3	91.8	92.6	85.1	88.9	—	—	—
Michigan	91.3	83.1	87.2	95.8	87.2	91.6	93.5	85.9	89.7	—	—	—
North Illinois	91.0	83.4	87.2	95.9	87.3	91.6	93.3	85.6	89.5	—	—	—
Central Mississippi	91.6	82.7	87.2	96.4	87.3	91.9	93.0	85.2	89.1	—	—	—
Lower Mississippi	91.7	83.2	87.5	97.0	87.2	92.1	92.8	85.8	89.3	—	—	—
North Plains	91.7	83.1	87.4	96.7	87.9	92.3	92.3	83.8	88.1	—	—	—
Central Plains	91.5	83.5	87.5	94.8	86.3	90.6	93.2	85.4	89.3	—	—	—
South Plains	91.3	82.8	87.1	96.9	86.5	91.7	92.6	85.0	88.8	—	—	—
South Texas	91.7	82.6	87.2	97.0	86.9	91.9	93.1	85.4	89.3	—	—	—
South Mountain States	90.7	82.1	86.4	96.7	86.1	91.4	91.5	84.1	87.8	—	—	—
North Mountain States	89.9	82.4	86.2	95.3	86.3	90.9	91.9	82.8	87.4	—	—	—
Pacific Northwest	91.8	83.4	87.6	96.1	87.1	91.6	92.4	85.0	88.8	—	—	—
North California	93.0	83.4	88.2	97.2	86.4	91.8	98.4	84.9	89.7	—	—	—
South California	92.7	83.3	88.0	97.4	87.0	92.2	93.5	85.3	89.4	—	—	—
Average												
Summer 1984	**91.6**	**82.9**	**87.3**	**96.5**	**86.9**	**91.7**	**92.9**	**85.0**	**89.0**	—	—	—
Summer 1983	**92.0**	**82.9**	**87.5**	**96.2**	**86.5**	**91.4**	**93.1**	**84.9**	**89.0**	—	—	—

(a) In 1981, DOE began two classifications for leaded gasoline—below 93 octane and above 93 octane; however, nothing has been published in the above 93 octane category since the winter of 1981-82.

Source: Motor Gasolines, Summer 1984, National Institute for Petroleum and Energy Research, Bartlesville, Okla., February 1985.

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Gasohol Consumption by States—1983

The following table, prepared by the Federal Highway Administration, contains a variety of caveats, as follows: the table shows gross gallons of gasohol reported by the distributors in each state. However, this total must not be considered a national total. In states where gasohol is taxed at the same rate as gasoline, the gallonage data is not reported separately and is commingled with gasoline data. In other states, however, partial tax exemptions have been legislated but the reporting systems have not yet been converted for separate reporting. In any case, the totals should be considered minimums and not maximums.

(Add 000 gal.)

State	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Alabama	1,621	1,937	2,572	2,217	2,253	2,589	2,401	2,742	2,537	2,729	2,843	3,196	29,637
Alaska	—	—	—	—	—	—	—	—	—	—	—	—	—
Arizona	—	79	11	350	115	150	27	12	22	6	—	—	772
Arkansas	291	1,310	1,064	1,018	943	1,031	1,200	1,419	1,219	718	1,534	884	12,631
California	51,741	37,266	44,414	33,571	44,036	46,127	48,346	45,017	32,421	26,845	37,229	33,837	480,850
Colorado	4,389	3,400	4,105	3,931	3,363	3,356	3,500	2,700	4,500	8,900	8,451	5,967	56,562
Connecticut	407	433	410	226	—	—	—	—	—	—	—	—	1,476
Delaware	—	—	—	—	—	—	—	—	—	—	—	—	—
Dist. of Col.	1	1	4	10	—	—	—	—	—	23	—	13	52
Florida	13,790	16,977	24,560	24,755	26,738	32,063	35,639	35,027	33,587	36,605	36,097	41,394	357,232
Georgia	29	20	29	2	21	20	21	5	2	7	1	1	158
Hawaii	—	—	—	—	—	—	—	—	—	—	—	—	—
Idaho	419	506	680	905	884	693	764	764	714	1,051	974	397	8,747
Illinois	18,552	16,944	21,552	18,816	19,872	20,856	22,392	19,248	20,472	20,712	18,624	21,960	240,000
Indiana	30,144	38,444	46,996	41,043	43,349	45,511	46,893	56,053	47,073	37,830	45,801	45,939	525,076
Iowa	35,042	39,061	41,574	44,966	41,540	50,762	44,968	44,585	42,018	41,401	39,524	44,763	510,206
Kansas	562	565	679	615	514	873	5,687	7,889	7,865	10,455	13,730	17,962	67,396
Kentucky	4,989	5,132	3,747	6,924	7,665	8,190	8,837	10,011	9,817	10,301	6,740	18,293	100,646
Louisiana	—	—	—	—	—	—	—	—	—	—	—	—	—
Maine	—	—	—	—	—	—	—	—	—	—	—	—	—
Maryland	4	10	7	4	—	7	—	16	6	6	8	6	74
Massachusetts	19	19	9	9	—	—	—	—	—	—	—	—	56
Michigan	27,091	24,763	28,765	47,935	64,206	68,160	69,247	63,614	43,312	40,573	42,193	46,132	565,991
Minnesota	434	103	141	494	760	194	201	161	196	307	339	248	3,578
Mississippi	—	—	—	—	—	—	—	—	—	—	—	—	—
Missouri	583	583	583	583	583	583	583	583	583	583	583	583	6,996
Montana	925	1,219	1,080	1,013	1,115	1,238	1,492	952	629	642	729	292	11,326
Nebraska	11,338	11,063	13,362	12,522	14,199	16,010	14,779	17,867	18,531	17,430	17,307	18,937	183,345
Nevada	61	36	54	60	72	—	—	—	—	—	—	—	283
New Hampshire	—	—	—	—	—	—	—	—	—	—	—	—	—
New Jersey	—	—	—	—	—	—	—	—	—	—	—	—	—
New Mexico	13	31	601	587	673	1,945	2,035	3,610	3,696	3,714	2,792	6,892	26,589
New York	—	—	—	—	—	—	—	—	—	—	—	—	—
North Carolina	367	311	347	442	282	245	138	107	42	181	178	272	2,912
North Dakota	105	531	383	320	331	457	352	364	334	118	655	490	4,440
Ohio	40,549	36,094	50,231	49,544	48,765	66,774	26,838	32,564	40,776	39,656	26,597	30,904	489,292
Oklahoma	27,862	23,203	1,171	60	—	3,958	3,945	4,274	3,690	2,241	2,027	3,273	75,704
Oregon	—	—	—	708	227	61	96	81	66	56	47	28	1,370
Pennsylvania	—	—	—	—	—	—	—	—	—	—	—	—	—
Rhode Island	—	—	—	—	—	—	—	—	—	—	—	—	—
South Carolina	161	227	188	82	116	121	46	24	5	14	20	14	1,018
South Dakota	1,676	1,767	2,291	1,856	2,593	2,942	3,178	3,259	3,021	2,892	3,015	3,457	31,947
Tennessee	—	—	—	—	—	—	—	—	—	—	—	—	—
Texas	21,327	25,423	40,522	46,102	51,026	42,249	31,376	17,846	2,140	1,412	1,274	1,394	282,091
Utah	—	—	—	—	—	—	—	—	—	—	—	—	—
Vermont	—	—	—	—	—	—	—	—	—	—	—	—	—
Virginia	3,594	2,457	4,849	3,702	3,993	3,126	5,185	3,394	3,528	3,391	4,073	4,921	46,213
Washington	673	1,078	1,076	545	856	810	525	543	457	259	324	797	7,943
West Virginia	—	—	—	—	—	—	—	—	—	—	—	—	—
Wisconsin	68	187	74	109	39	61	198	117	33	26	94	40	1,046
Wyoming	8	12	11	13	13	16	25	28	22	19	13	22	202
Total	**298,835**	**291,192**	**338,142**	**346,039**	**381,142**	**421,178**	**380,914**	**374,876**	**323,314**	**311,103**	**313,816**	**353,306**	**4,133,857**

Source: Federal Highway Administration, Monthly Gasoline Reports, 1984.

Gasohol Consumption by States—1984

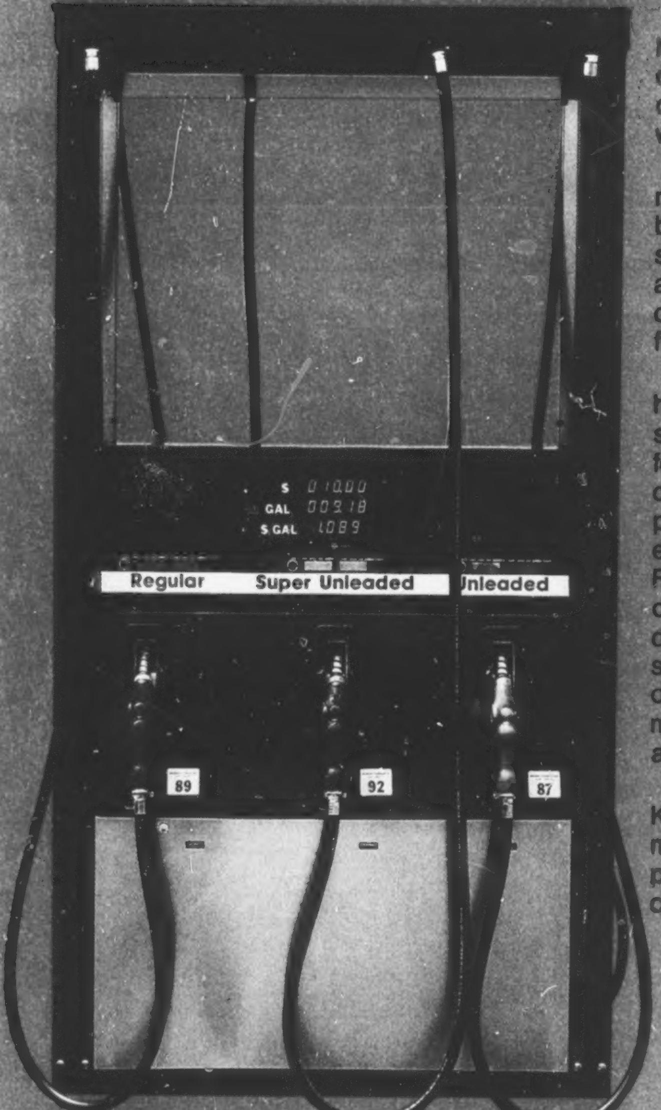
The table below, prepared by the Federal Highway Administration, shows gross gallons of gasohol reported by the distributors in each state. However, the agency says, the total must not be considered as a national total. In states where gasohol is taxed at the same rate as gasoline, the gallonage data are not reported separately and are commingled with gasoline data. In other states, however, partial tax exemptions have been legislated but the reporting systems have not yet been converted for separate reporting. In any case, this total should be considered a minimum, and not a national total. This also is a preliminary report.

(Add 000 gal.)

State	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Total
Alabama	2,833	2,572	3,177	3,022	2,945	2,805	2,452	2,616	2,378	2,728	3,593	3,778	34,899
Alaska	—	—	—	—	—	—	—	—	—	—	—	—	—
Arizona	—	—	—	—	—	—	—	—	—	—	—	—	—
Arkansas	1,474	1,175	1,180	1,216	2,006	2,112	3,595	3,328	4,255	3,117	2,765	2,648	28,871
California	30,904	25,334	39,806	47,294	57,430	54,982	28,166	26,642	23,173	20,355	21,652	26,099	401,837
Colorado	1,825	7,913	5,031	5,500	6,000	5,414	6,236	6,100	4,950	5,703	7,699	—	62,371
Connecticut	—	—	—	—	—	—	1,953	2,326	1,142	—	—	—	5,421
Delaware	—	—	—	—	—	—	—	—	—	—	—	—	—
Dist. of Col.	12	7	12	13	4	7	—	3	2	3	—	—	63
Florida	34,110	43,879	43,025	38,697	40,284	34,978	48,794	43,873	41,995	45,542	45,726	47,848	508,751
Georgia	9	5	1	1	—	—	—	—	—	—	—	—	16
Hawaii	—	—	—	—	—	—	—	—	—	—	—	—	—
Idaho	238	407	473	513	448	326	342	571	942	1,146	1,252	—	6,658
Illinois	22,031	22,031	34,294	36,745	41,682	54,262	52,082	—	—	—	—	—	263,127
Indiana	43,881	41,732	43,883	45,613	47,033	51,481	51,281	54,249	52,658	51,252	—	—	483,063
Iowa	39,114	34,190	39,565	39,284	41,743	39,707	41,227	41,826	33,266	35,749	35,057	36,500	457,228
Kansas	17,433	20,103	23,335	23,972	26,793	26,394	24,808	22,753	20,554	21,902	21,249	—	249,296
Kentucky	17,423	16,060	22,318	22,272	30,238	31,723	28,753	33,282	28,391	32,538	32,200	33,040	328,238
Louisiana	—	—	—	—	—	—	295	2,816	3,169	3,237	6,694	8,213	24,424
Maine	—	—	—	—	—	—	—	—	—	—	—	—	—
Maryland	5	6	7	6	9	5	7	8	6	5	7	11	82
Massachusetts	—	—	—	—	—	—	—	—	—	—	—	—	—
Michigan	36,656	45,888	39,274	55,066	50,558	58,436	45,892	50,823	44,058	48,951	53,910	48,211	577,723
Minnesota	273	295	333	425	107	80	517	85	272	100	128	92	2,707
Mississippi	—	—	—	—	—	—	—	—	—	—	—	—	—
Missouri	—	—	—	—	—	—	—	—	—	—	—	—	—
Montana	579	323	937	1,230	847	923	809	1,281	598	776	—	—	8,303
Nebraska	16,170	15,095	15,659	15,809	17,552	18,739	17,639	18,952	17,283	18,297	18,606	18,654	208,455
Nevada	—	—	—	—	—	—	—	—	—	—	—	—	—
New Hampshire	—	—	—	—	—	—	—	—	—	—	—	—	—
New Jersey	—	—	—	—	—	—	—	—	—	—	—	—	—
New Mexico	4,178	4,572	11,078	6,916	3,612	1,898	3,108	3,552	5,974	4,383	7,223	—	56,494
New York	—	—	—	—	—	—	—	—	—	—	—	—	—
North Carolina	361	477	522	639	1,033	1,318	1,495	1,631	1,372	5,607	9,296	10,286	34,037
North Dakota	203	589	111	325	881	535	505	104	938	543	145	590	5,469
Ohio	31,852	30,574	38,399	39,634	44,832	44,926	40,110	44,019	40,935	44,707	—	—	399,988
Oklahoma	3,322	2,810	2,488	2,738	2,520	974	1,256	1,984	1,805	1,357	952	1,414	23,620
Oregon	35	11	33	27	23	21	31	30	—	42	12	33	298
Pennsylvania	—	—	—	—	—	—	—	—	—	—	—	—	—
Rhode Island	—	—	—	—	—	—	—	—	—	—	—	—	—
South Carolina	8	11	1	29	16	12	13	—	15	14	15	20	154
South Dakota	2,856	2,628	3,246	3,216	3,674	3,591	3,811	4,078	3,153	3,882	3,715	—	37,850
Tennessee	7,094	8,342	11,351	11,663	7,561	9,441	10,461	9,001	9,149	4,904	11,280	9,515	109,762
Texas	1,132	2,521	6,643	19,689	18,879	20,151	21,262	18,431	21,460	23,459	26,117	27,408	207,152
Utah	2,740	3,287	4,203	4,605	5,176	5,232	373	18	81	147	—	—	25,862
Vermont	—	—	—	—	—	—	—	—	—	—	—	—	—
Virginia	4,172	3,969	8,215	6,702	9,718	14,572	13,458	15,336	13,791	13,959	13,874	13,852	131,618
Washington	646	610	512	338	1,066	473	1,290	901	958	883	686	780	9,143
West Virginia	—	—	—	—	—	—	—	—	—	—	—	—	—
Wisconsin	105	22	11	21	25	31	126	372	273	359	250	367	1,962
Wyoming	28	17	14	24	18	—	17	26	102	20	22	—	288
Total	**323,702**	**337,455**	**399,137**	**433,244**	**464,713**	**485,549**	**452,164**	**411,017**	**379,098**	**395,667**	**324,125**	**289,359**	**4,695,230**

Source: Federal Highway Administration, Monthly Gasoline Reports, 1984.

Koppens New Calcu-Trim Model is Easy to Squeeze Into Your Budget.



Koppens new Calcu-trim model has a narrow design that requires only 4 feet on an island, where conventional dispensers simply wouldn't fit before.

It also has a lower price, which makes it just as easy to fit your budget. And besides the smaller size and attractive price, you'll also appreciate the fact that it's part of a complete Koppens system that can fit all your dispensing requirements.

While we've trimmed the size, we haven't cut down on features. You still get the profits from two, three or four products per side, to maximize customer throughput, along with performance and reliability you expect from every Koppens system Features like micro processor controlled calculator, cash/credit display and selection button, solid state dual pulsers to insure smooth operation and accurate measurement. And stainless steel housing assure long life and durability.

Call today for more information on Koppens new affordable Calcu-trim models. Once you get the profit picture, you're sure to narrow your choice to Koppens.

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Virginia 804-487-0077 Telex: 82-3602 Koppens Chpk. Cable: Koppens Chpk.

Diesel Sales for Highway Use

Diesel sales for motor vehicles—passenger cars and trucks—rose 7.2% in 1983 after 1982's relatively level performance. Sales amounted to 362.3-million bbl., or 15.2-billion gal. versus 14.2-billion gal. in the preceding year.

Off-highway sales declined slightly in 1983—about 1%. They amounted to 36.7-million bbl., or 1.5-billion gal. Sales in 1982 were 37.1-million bbl., or 1.6-billion gal. Off-highway consumption is primarily farm and construction equipment and conveniences.

(Add 000 bbl.)

	On-Highway			Off-Highway		
PAD DISTRICTS	**1983**	**1982**	**% Change**	**1983**	**1982**	**% Change**
District 1						
New England States						
Connecticut	3,203	2,696	18.7%	239	251	(4.8%)
Maine	1,731	1,564	10.7	231	243	(5.0)
Massachusetts	5,378	4,745	13.3	294	309	(4.9)
New Hampshire	800	744	8.0	162	170	(4.7)
Rhode Island	721	679	6.6	36	38	(5.3)
Vermont	722	352	105.1	164	173	(5.2)
Central Atlantic States						
Delaware	1,024	921	11.2	127	134	(5.2)
District of Columbia	475	436	8.9	9	9	—
Maryland	4,610	4,023	14.6	310	326	(4.9)
New Jersey	8,717	8,093	7.7	494	519	(4.8)
New York	8,948	8,353	7.1	589	619	(4.9)
Pennsylvania	16,048	15,296	4.9	2,031	2,136	(4.9)
Lower Atlantic States						
Florida	19,681	13,098	50.3	295	310	(4.8)
Georgia	13,321	11,801	12.9	182	191	(4.7)
North Carolina	10,869	9,789	11.0	281	296	(5.1)
South Carolina	6,213	5,682	9.3	187	197	(5.1)
Virginia	8,686	8,286	4.9	544	572	(4.9)
West Virginia	2,549	2,381	6.9	236	248	(4.8)
Total	**113,696**	**98,941**	**14.9**	**6,411**	**6,741**	**(4.9)**
District 2						
Illinois	13,344	13,744	(2.2)	791	842	(6.0)
Indiana	14,133	13,621	3.3	369	393	(6.1)
Iowa	6,800	6,525	4.2	450	479	(6.1)
Kansas	5,288	5,100	3.3	253	269	(5.9)
Kentucky	6,361	5,747	10.7	793	844	(6.0)
Michigan	8,803	8,181	7.6	340	362	(6.1)
Minnesota	6,753	6,341	6.5	402	428	(6.1)
Missouri	9,199	9,004	2.2	1,126	1,198	(6.9)
Nebraska	4,111	4,086	0.6	210	224	(6.3)
North Dakota	2,098	2,084	0.7	243	259	(6.2)
Ohio	17,659	17,092	3.3	3,085	3,283	(6.4)
Oklahoma	8,307	8,251	0.7	762	811	(6.0)
South Dakota	1,986	1,900	4.5	96	102	(5.9)
Tennessee	10,587	9,505	11.4	302	321	(6.9)
Wisconsin	7,711	7,072	9.0	433	461	(6.1)
Total	**123,118**	**118,453**	**3.9**	**9,655**	**10,276**	**(6.0)**
District 3						
Alabama	7,450	6,758	10.2	734	703	4.2
Arkansas	5,820	5,512	5.6	916	877	4.4
Louisiana	7,880	7,510	4.9	2,672	2,559	4.4
Mississippi	5,626	5,257	7.0	724	693	4.4
New Mexico	4,020	3,512	10.4	511	489	4.5
Texas	32,407	32,692	(0.9)	7,503	7,184	4.4
Total	**63,203**	**61,241**	**3.2**	**13,060**	**12,505**	**4.4**
District 4						
Colorado	4,597	4,211	9.2	628	595	5.5
Idaho	1,499	1,718	(12.7)	246	233	5.6
Montana	2,425	2,473	(1.9)	161	153	5.2
Utah	2,642	2,550	3.6	565	536	5.4
Wyoming	2,542	2,253	12.8	610	578	5.5
Total	**13,705**	**13,205**	**3.8**	**2,210**	**2,095**	**5.5**
District 5						
Alaska	1,174	596	97.0	416	424	(1.9)
Arizona	4,816	4,581	5.1	271	276	(1.8)
California	28,804	27,679	4.1	2,971	3,026	(1.8)
Hawaii	515	415	24.1	151	154	(1.9)
Nevada	2,043	1,977	3.3	174	177	(1.7)
Oregon	5,469	5,339	2.4	337	343	(1.7)
Washington	5,733	5,579	2.8	1,081	1,101	(1.8)
Total	**48,554**	**46,166**	**5.2**	**5,401**	**5,501**	**(1.8)**
U.S. Total	**362,276**	**338,006**	**7.2%**	**36,737**	**37,118**	**(1.0%)**

Source: Petroleum Supply Annual. Energy Information Division. June 1984.

Our carwash is designed so well, the cars wash themselves.

N/S Corporation looks at it logically: cars are made to move and a carwash is made to get cars clean; so why should we build a carwash that moves cars?

N/S has built a system that gets cars sparkling clean as they are being *driven* thru the wash. No chains, no guide rails, no special positioning. Just a leisurely cruise thru a really well designed car washing system built by N/S Corporation.

There are no complicated controls or devices that break down and cost you money. Your customers will love driving their own cars thru the patented N/S system since no guiderails are required. And you both will appreciate the results: a sparkling clean car for just a few cents and a few minutes of time.

If you are looking for a machine to clean cars efficiently and economically, the one you are looking for is being manufactured by N/S Corporation: machinery so well-designed, the cars wash themselves.

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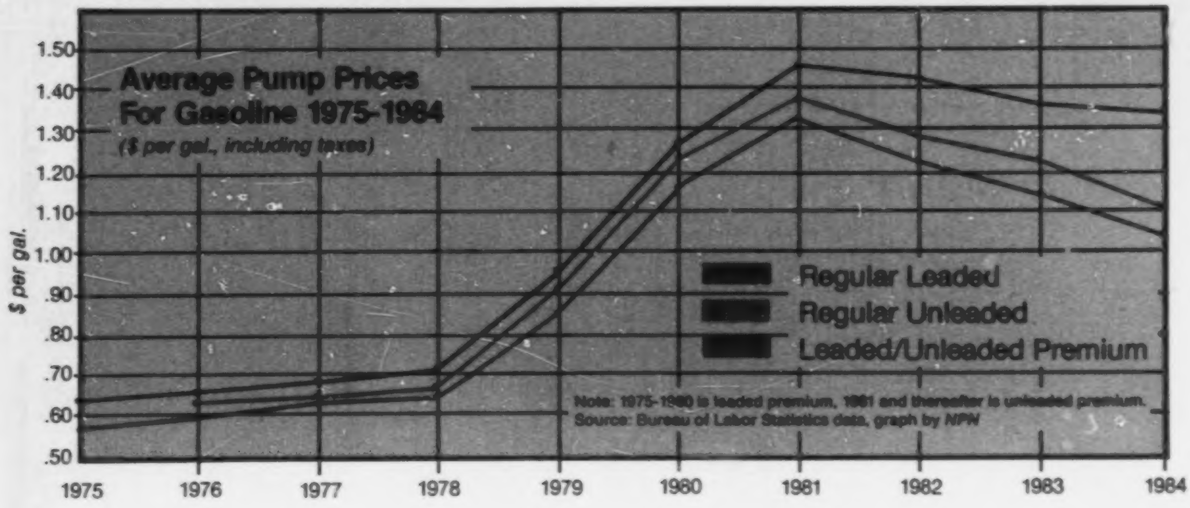


Average Pump Prices For Gasoline 1975-1984

($ per gal., including taxes)

Note: 1975-1980 is leaded premium, 1981 and thereafter is unleaded premium.
Source: Bureau of Labor Statistics data, graph by *NPN*

Retail Gasoline Prices for Selected Areas—1978-1984

(In $ per gal., including appropriate federal, state and local taxes, and representative of full service, self-service and mini-service pumps and stations. Although single-city identifications are used in the table below, each is actually a Standard Metropolitan Statistical Area or a Standard Consolidated Area as defined by the Office of Management and Budget and normally used by the Bureau of Labor Statistics, Census Bureau, etc.).

	1984		1983		1982		1981		1980		1979		1978	
Area	**Lead**	**Unld.**	**Lead**	**Unld.**	**Lead**	**Unld.**	**Lead**	**Unld.**	**Lead**	**Unld.**	**Lead**	**Unld.**	**Lead**	**Unld.**
U.S. City Average (a)	**$1.137**	**$1.212**	**$1.157**	**$1.241**	**$1.222**	**$1.296**	**$1.311**	**$1.378**	**$1.191**	**$1.245**	**$.857**	**$.903**	**$.627**	**$.670**
Anchorage, Alaska	1.204	1.294	1.253	1.339	1.380	1.446	1.408	1.465	1.241	1.275	.921	.952	.744	.767
Atlanta, Ga.	1.110	1.225	1.143	1.248	1.234	1.319	1.328	1.397	1.197	1.251	.843	.890	.624	.668
Baltimore, Md.	1.092	1.164	1.244	1.296	1.288	1.335	1.334	1.389	1.204	1.251	.844	.891	.613	.666
Boston, Mass.	1.078	1.175	1.155	1.225	1.234	1.283	1.337	1.391	1.199	1.241	.857	.899	.623	.660
Buffalo, N.Y.	1.173	1.249	1.222	1.288	1.248	1.306	1.336	1.394	1.235	1.260	.899	.948	.644	.687
Chicago, Ill.	1.211	1.284	1.223	1.298	1.264	1.321	1.344	1.410	1.246	1.304	.925	.979	.680	.730
Cincinnati, Ohio	1.153	1.218	1.187	1.257	1.217	1.293	1.275	1.345	1.154	1.206	.842	.882	.618	.655
Cleveland, Ohio	1.130	1.214	1.175	1.248	1.269	1.327	1.304	1.385	1.160	1.203	.839	.884	.621	.665
Dallas-Ft. Worth, Texas	1.072	1.163	1.081	1.158	1.140	1.209	1.245	1.307	1.132	1.186	.789	.833	.579	.617
Denver-Boulder, Colo.	1.049	1.153	1.091	1.197	1.197	1.273	1.259	1.330	1.150	1.217	.838	.886	.612	.663
Detroit, Mich.	1.236	1.276	1.227	1.280	1.247	1.304	1.335	1.395	1.242	1.303	.891	.947	.643	.696
Honolulu, Hawaii	1.366	1.443	1.400	1.462	1.472	1.542	1.409	1.567	1.298	1.355	.937	.976	.759	.764
Houston, Texas	1.015	1.116	1.040	1.132	1.143	1.212	1.261	1.313	1.139	1.183	.794	.835	.567	.613
Kansas City, Mo.-Kan.	1.082	1.142	1.155	1.226	1.195	1.262	1.237	1.298	1.137	1.190	.843	.886	.604	.644
Los Angeles, Calif.	1.102	1.206	1.166	1.215	1.232	1.318	1.337	1.409	1.213	1.271	.892	.943	.644	.691
Miami, Fla.	1.126	1.215	1.207	1.326	1.257	1.364	1.319	1.389	1.186	1.235	.841	.892	.611	.661
Milwaukee, Wisc.	1.147	1.202	1.190	1.224	1.245	1.286	1.273	1.329	1.139	1.198	.819	.864	.595	.631
Minneapolis, St. Paul, Minn.	1.171	1.223	1.211	1.284	1.253	1.328	1.294	1.360	1.175	1.231	.860	.901	.618	.654
New York, N.Y.	1.116	1.189	1.181	1.257	1.249	1.319	1.355	1.413	1.241	1.286	.882	.927	.632	.675
NE Pennsylvania	1.137	1.204	1.157	1.208	1.197	1.242	1.306	1.353	1.178	1.218	.837	.879	.610	.650
Philadelphia, Pa.	1.141	1.213	1.149	1.210	1.188	1.255	1.309	1.365	1.192	1.233	.855	.904	.618	.658
Pittsburgh, Pa.	1.150	1.238	1.147	1.233	1.234	1.312	1.356	1.409	1.205	1.242	.857	.893	.628	.663
Portland, Ore.	1.116	1.222	1.121	1.230	1.257	1.337	1.317	1.381	1.193	1.226	.870	.907	.636	.681
St. Louis, Mo.-Ill.	1.086	1.142	1.111	1.164	1.151	1.213	1.230	1.299	1.145	1.208	.851	.897	.607	.656
San Diego, Calif.	1.162	1.212	1.157	1.253	1.240	1.339	1.323	1.408	1.215	1.280	.881	.932	.636	.691
San Fran.-Oakland, Calif.	1.156	1.302	1.154	1.290	1.260	1.353	1.355	1.436	1.243	1.310	.899	.961	.661	.717
Seattle-Everett, Wash.	1.178	1.239	1.145	1.182	1.227	1.271	1.335	1.401	1.211	1.253	.877	.917	.650	.677
Washington, DC	1.203	1.269	1.232	1.288	1.256	1.304	1.334	1.393	1.224	1.276	.853	.906	.651	.702
Region (b)														
Northeast	1.142	1.204	1.181	1.248	1.238	1.298	1.344	1.396	1.220	1.260	.870	.913	.631	.672
North Central	1.156	1.233	1.191	1.261	1.233	1.298	1.303	1.370	1.183	1.244	.861	.910	.628	.671
South	1.105	1.192	1.132	1.217	1.196	1.272	1.293	1.360	1.172	1.223	.831	.863	.611	.654
West	1.139	1.220	1.132	1.238	1.233	1.325	1.323	1.405	1.201	1.267	.879	.936	.643	.695

(a) The grades are regular in both cases.
(b) Regions are the four U.S. Census Bureau regions.
Source: Bureau of Labor Statistics, Department of Commerce; 1984 data averaged by *NPN*.

'84 Retail Gasoline Prices—Selected Areas

(In $ per gal., including appropriate federal, state and local taxes, and representative of full service, self-service and mini-service pumps and stations. Although single-city identifications are used in the table below, each is actually a Standard Metropolitan Statistical Area or a Standard Consolidated Area as defined by the Office of Management and Budget and normally used by the Bureau of Labor Statistics, Census Bureau, etc.)

Gasoline—All Types

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average For Year
U.S. City Average	$1.200	$1.193	$1.194	$1.211	$1.221	$1.214	$1.197	$1.184	$1.189	$1.196	$1.193	$1.170	$1.197
Anchorage, Alaska	1.300	1.286	1.272	1.261	1.252	1.255	1.253	1.250	1.249	1.249	1.250	1.249	1.261
Atlanta, Ga.	1.190	1.215	1.220	1.221	1.212	1.208	1.198	1.191	1.195	1.192	1.187	1.169	1.200
Baltimore, Md.	1.190	1.188	1.183	1.186	1.184	1.179	1.168	1.144	1.152	1.154	1.150	1.148	1.169
Boston, Mass.	1.175	1.170	1.181	1.178	1.176	1.169	1.158	1.152	1.155	1.158	1.153	1.147	1.164
Buffalo, N.Y.	1.256	1.249	1.244	1.240	1.239	1.237	1.229	1.212	1.214	1.215	1.215	1.203	1.229
Chicago, Ill.	1.270	1.273	1.273	1.289	1.290	1.291	1.275	1.260	1.263	1.265	1.260	1.254	1.272
Cincinnati, Ohio	1.218	1.227	1.235	1.239	1.242	1.236	1.218	1.204	1.215	1.158	1.148	1.139	1.204
Cleveland, Ohio	1.204	1.196	1.197	1.208	1.224	1.214	1.193	1.185	1.190	1.193	1.186	1.175	1.197
Dallas-Fort Worth, Texas	1.137	1.127	1.124	1.136	1.136	1.137	1.138	1.181	1.189	1.187	1.171	1.164	1.152
Denver-Boulder, Colo.	1.078	1.112	1.120	1.135	1.134	1.121	1.092	1.085	1.105	1.105	1.094	1.062	1.104
Detroit, Mich.	1.270	1.264	1.285	1.297	1.312	1.288	1.259	1.251	1.279	1.291	1.284	1.263	1.280
Honolulu, Hawaii	1.468	1.464	1.446	1.459	1.477	1.497	1.497	1.498	1.409	1.404	1.394	1.384	1.450
Houston, Texas	1.093	1.093	1.094	1.106	1.105	1.109	1.102	1.147	1.148	1.144	1.131	1.110	1.115
Kansas City, Mo.-Kan.	1.105	1.124	1.122	1.151	1.165	1.154	1.135	1.107	1.083	1.087	1.075	1.061	1.114
Los Angeles, Calif.	1.185	1.153	1.159	1.218	1.256	1.225	1.150	1.130	1.154	1.211	1.215	1.188	1.189
Miami, Fla.	1.214	1.217	1.221	1.229	1.230	1.229	1.216	1.202	1.205	1.205	1.204	1.185	1.213
Milwaukee, Wisc.	1.218	1.173	1.201	1.217	1.212	1.203	1.183	1.168	1.184	1.195	1.188	1.167	1.192
Minneapolis-St. Paul, Minn.	1.214	1.208	1.204	1.224	1.225	1.223	1.213	1.206	1.205	1.205	1.204	1.192	1.210
New York, N.Y.	1.219	1.221	1.215	1.213	1.212	1.209	1.201	1.180	1.186	1.185	1.178	1.176	1.198
Northeast Pennsylvania	1.204	1.195	1.188	1.189	1.191	1.193	1.186	1.176	1.178	1.301	1.194	1.190	1.196
Philadelphia, Pa.	1.227	1.216	1.209	1.212	1.214	1.217	1.208	1.201	1.205	1.209	1.196	1.192	1.209
Pittsburgh, Pa.	1.243	1.231	1.228	1.236	1.246	1.246	1.238	1.227	1.225	1.219	1.215	1.212	1.230
Portland, Ore.	1.181	1.145	1.147	1.231	1.240	1.235	1.201	1.168	1.178	1.199	1.208	1.206	1.195
St. Louis, Mo.	1.130	1.132	1.142	1.167	1.165	1.161	1.146	1.128	1.130	1.128	1.130	1.120	1.140
San Diego, Calif.	1.227	1.201	1.201	1.255	1.285	1.266	1.194	1.171	1.187	1.232	1.248	1.241	1.226
San Francisco, Calif.	1.268	1.247	1.260	1.307	1.334	1.324	1.288	1.251	1.255	1.295	1.301	1.291	1.285
Seattle-Everett, Wash.	1.209	1.163	1.146	1.214	1.246	1.248	1.245	1.215	1.230	1.250	1.258	1.256	1.223
Washington, D.C.	1.305	1.305	1.294	1.295	1.296	1.212	1.286	1.275	1.274	1.268	1.263	1.259	1.278

Gasoline—Leaded Regular

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average For Year
U.S. City Average	$1.131	$1.216	$1.123	$1.145	$1.154	$1.147	$1.129	$1.116	$1.120	$1.127	$1.124	$1.109	$1.137
Anchorage, Alaska	1.245	1.236	1.209	1.199	1.194	1.197	1.197	1.195	1.197	1.193	1.191	1.189	1.204
Atlanta, Ga.	1.095	1.118	1.122	1.133	1.134	1.127	1.114	1.098	1.104	1.100	1.086	1.079	1.110
Baltimore, Md.	1.112	1.109	1.106	1.110	1.108	1.102	1.091	1.088	1.078	1.077	1.074	1.072	1.092
Boston, Mass.	1.093	1.088	1.096	1.099	1.094	1.085	1.070	1.062	1.064	1.063	1.060	1.055	1.076
Buffalo, N.Y.	1.203	1.195	1.191	1.183	1.186	1.160	1.172	1.154	1.155	1.157	1.158	1.145	1.173
Chicago, Ill.	1.201	1.209	1.209	1.224	1.266	1.244	1.208	1.194	1.199	1.201	1.195	1.186	1.211
Cincinnati, Ohio	1.161	1.171	1.168	1.179	1.187	1.183	1.159	1.147	1.161	1.119	1.111	1.091	1.153
Cleveland, Ohio	1.143	1.135	1.136	1.146	1.163	1.149	1.122	1.114	1.116	1.120	1.113	1.105	1.130
Dallas-Ft. Worth, Texas	1.059	1.048	1.046	1.057	1.056	1.055	1.057	1.099	1.104	1.104	1.091	1.086	1.072
Denver-Boulder, Colo.	1.022	1.059	1.069	1.085	1.084	1.069	1.035	1.028	1.049	1.051	1.037	.999	1.049
Detroit, Mich.	1.226	1.238	1.237	1.254	1.266	1.244	1.217	1.208	1.238	1.249	1.239	1.216	1.236
Honolulu, Hawaii	1.396	1.387	1.372	1.381	1.401	1.425	1.421	1.419	1.310	1.306	1.298	1.285	1.366
Houston, Texas	.985	.987	.993	1.006	1.007	1.006	1.004	1.051	1.050	1.048	1.032	1.009	1.015
Kansas City, Mo.-Kan.	1.075	1.093	1.092	1.122	1.137	1.125	1.108	1.079	1.047	1.049	1.035	1.013	1.082
Los Angeles, Calif.	1.110	1.086	1.072	1.133	1.173	1.137	1.057	1.041	1.068	1.122	1.129	1.112	1.102
Miami, Fla.	1.128	1.130	1.135	1.144	1.144	1.143	1.129	1.113	1.114	1.114	1.114	1.099	1.128
Milwaukee, Wisc.	1.196	1.125	1.154	1.170	1.165	1.155	1.136	1.120	1.135	1.146	1.140	1.116	1.147
Minneapolis-St. Paul, Minn.	1.175	1.170	1.183	1.186	1.186	1.182	1.172	1.168	1.165	1.165	1.165	1.153	1.171
New York, N.Y.	1.140	1.144	1.137	1.137	1.138	1.132	1.124	1.081	1.006	1.091	1.081	1.082	1.116
Northeast Pennsylvania	1.166	1.155	1.144	1.146	1.148	1.148	1.142	1.128	1.130	1.117	1.115	1.110	1.137
Philadelphia, Pa.	1.159	1.150	1.143	1.147	1.150	1.151	1.138	1.133	1.136	1.141	1.138	1.122	1.141
Pittsburgh, Pa.	1.175	1.170	1.144	1.154	1.162	1.163	1.152	1.142	1.143	1.136	1.130	1.125	1.150
Portland, Ore.	1.093	1.066	1.069	1.161	1.171	1.159	1.119	1.084	1.097	1.120	1.129	1.123	1.116
St. Louis, Mo.-Ill.	1.075	1.079	1.089	1.116	1.111	1.108	1.092	1.075	1.074	1.023	1.077	1.066	1.086
San Diego, Calif.	1.167	1.138	1.136	1.192	1.227	1.206	1.129	1.105	1.119	1.167	1.183	1.176	1.162
San Francisco, Calif.	1.145	1.122	1.135	1.188	1.215	1.206	1.156	1.117	1.112	1.160	1.166	1.154	1.156
Seattle-Everett, Wash.	1.160	1.112	1.094	1.172	1.201	1.201	1.201	1.171	1.187	1.207	1.214	1.215	1.178
Washington, D.C.	1.235	1.232	1.210	1.210	1.212	1.213	1.200	1.189	1.189	1.184	1.184	1.180	1.203

Source: Bureau of Labor Statistics, Department of Commerce, Consumer and Energy Prices, 1984.

Gasoline—Unleaded Regular

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average For Year
U.S. City Average	$1.216	$1.209	$1.210	$1.227	$1.236	$1.229	$1.212	$1.196	$1.203	$1.209	$1.207	$1.193	$1.212
Anchorage, Alaska	1.333	1.329	1.312	1.301	1.285	1.288	1.283	1.281	1.273	1.278	1.283	1.283	1.294
Atlanta, Ga.	1.218	1.247	1.252	1.253	1.231	1.225	1.219	1.215	1.218	1.217	1.210	1.193	1.225
Baltimore, Md.	1.194	1.184	1.177	1.181	1.180	1.174	1.163	1.139	1.149	1.151	1.145	1.144	1.164
Boston, Mass.	1.183	1.178	1.192	1.187	1.185	1.177	1.169	1.163	1.166	1.169	1.166	1.159	1.175
Buffalo, N.Y.	1.274	1.287	1.282	1.258	1.255	1.254	1.248	1.232	1.236	1.238	1.237	1.224	1.249
Chicago, Ill.	1.284	1.282	1.282	1.301	1.301	1.304	1.286	1.271	1.278	1.279	1.273	1.268	1.284
Cincinnati, Ohio	1.236	1.244	1.244	[illegible]	1.258	1.256	1.236	1.229	1.232	1.162	1.152	1.127	1.218
Cleveland, Ohio	1.220	1.209	1.210	1.220	1.238	1.232	1.212	1.206	1.211	1.214	1.206	1.193	1.214
Dallas-Fort Worth, Texas	1.148	1.139	1.135	1.145	1.148	1.149	1.148	1.193	1.202	1.197	1.178	1.169	1.163
Denver-Boulder, Colo.	1.141	1.172	1.176	1.190	1.189	1.179	1.154	1.146	1.166	1.164	.999	1.156	1.153
Detroit, Mich.	1.267	1.285	1.267	1.299	1.313	1.286	1.255	1.245	1.275	1.286	1.281	1.256	1.276
Honolulu, Hawaii	1.465	1.461	1.441	1.454	1.471	1.490	1.489	1.492	1.406	1.397	1.382	1.372	1.443
Houston, Texas	1.097	1.098	1.099	1.108	1.109	1.112	1.102	1.145	1.146	1.140	1.126	1.105	1.116
Kansas City, Mo.-Kan.	1.138	1.158	1.154	1.182	1.195	1.186	1.165	1.138	1.104	1.108	1.094	1.080	1.142
Los Angeles, Calif.	1.217	1.177	1.189	1.241	1.260	1.251	1.172	1.150	1.174	1.234	1.234	1.216	1.206
Miami, Fla.	1.217	1.220	1.225	1.233	1.234	1.231	1.219	1.203	1.207	1.207	1.208	1.181	1.215
Milwaukee, Wisc.	1.218	1.181	1.211	1.227	1.223	1.215	1.193	1.177	1.195	1.204	1.199	1.178	1.202
Minneapolis-St. Paul, Minn.	1.226	1.222	1.217	1.237	1.238	1.237	1.228	[illegible]	1.219	1.216	1.215	1.202	1.223
New York, N.Y.	1.218	1.211	1.208	1.202	1.200	1.197	1.187	[illegible]	1.176	1.170	1.166	1.164	1.189
Northeast Pennsylvania	1.218	1.211	1.204	1.209	1.210	1.213	1.203	1.194	1.197	1.199	1.198	1.194	1.204
Philadelphia, Pa.	1.232	1.229	1.211	1.218	1.218	1.219	1.213	1.205	1.200	1.213	1.197	1.195	1.213
Pittsburgh, Pa.	1.252	1.239	1.235	1.243	1.256	1.254	1.246	1.234	1.232	1.222	1.226	1.220	1.238
Portland, Ore.	1.220	1.172	1.168	1.250	1.263	1.260	1.229	1.198	1.202	1.226	1.236	1.237	1.222
St. Louis, Mo.-Ill.	1.135	1.135	1.146	1.170	1.169	1.163	1.148	1.127	1.131	1.128	1.130	1.119	1.142
San Diego, Calif.	1.212	1.184	1.185	1.241	1.275	1.254	1.170	1.155	1.176	1.223	1.241	1.229	1.212
San Francisco, Calif.	1.287	1.259	1.275	1.322	1.352	1.341	1.306	1.268	1.274	1.313	1.318	1.310	1.302
Seattle-Everett, Wash.	1.205	1.158	1.411	1.207	1.242	1.244	1.237	1.202	1.221	1.242	1.252	1.247	1.239
Washington, D.C.	1.284	1.283	1.279	1.281	1.281	1.279	1.272	1.262	1.263	1.257	1.247	1.243	1.269

Gasoline—Unleaded Premium

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average For Year
U.S. City Average	$1.369	$1.361	$1.362	$1.375	$1.380	$1.377	$1.370	$1.355	$1.360	$1.365	$1.364	$1.354	$1.366
Anchorage, Alaska	1.451	1.441	1.421	1.412	1.405	1.408	1.410	1.410	1.420	1.421	1.421	1.490	1.426
Atlanta, Ga.	1.343	1.364	1.372	1.358	1.358	1.360	1.352	1.354	1.357	1.354	1.352	1.323	1.354
Baltimore, Md.	1.337	1.338	1.329	1.329	1.321	1.322	1.312	1.287	1.287	1.294	1.290	1.286	1.311
Boston, Mass.	1.338	1.338	1.337	1.334	1.333	1.326	1.373	1.318	1.320	1.322	1.322	1.318	1.331
Buffalo, N.Y.	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Chicago, Ill.	1.510	1.511	1.510	1.519	1.522	1.526	1.329	1.299	1.491	1.498	1.495	1.486	1.474
Cincinnati, Ohio	1.401	1.405	1.405	1.408	1.419	1.418	1.397	1.375	1.385	1.296	1.288	1.278	1.374
Cleveland, Ohio	1.346	1.347	1.350	1.365	1.373	1.359	1.352	1.336	1.342	1.344	1.343	1.335	1.349
Dallas-Fort Worth, Texas	1.284	1.275	1.275	1.292	1.294	1.294	1.297	1.336	1.347	1.347	1.332	1.326	1.308
Denver-Boulder, Colo.	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Detroit, Mich.	1.481	1.486	1.489	1.490	1.499	1.486	1.466	1.470	1.489	1.498	1.496	1.499	1.488
Honolulu, Hawaii	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
Houston, Texas	1.272	1.265	1.258	1.275	1.269	1.279	1.273	1.320	1.322	1.322	1.314	1.294	1.289
Kansas City, Mo.-Kan.	NA	NA	NA	NA	NA	NA	NA	NA	1.198	1.206	1.219	1.209	NA
Los Angeles, Calif.	1.367	1.334	1.340	1.402	1.421	1.366	1.329	1.290	1.328	1.366	1.382	1.373	1.363
Miami, Fla.	1.338	1.341	1.342	1.350	1.353	1.353	1.340	1.330	1.334	1.335	1.335	1.319	1.339
Milwaukee, Wisc.	NA	1.373	1.377	1.389	1.388	1.371	1.363	1.354	1.370	1.378	1.370	1.358	1.370
Minneapolis-St. Paul, Minn.	1.362	1.355	1.380	1.390	1.399	1.399	1.388	1.383	1.382	1.384	1.383	1.393	1.386
New York, N.Y.	1.365	1.364	1.358	1.357	1.351	1.352	1.346	1.324	1.326	1.321	1.320	1.322	1.342
Northeast Pennsylvania	1.340	1.347	1.328	1.326	1.330	1.331	1.339	1.338	1.337	1.336	1.335	1.329	1.335
Philadelphia, Pa.	1.382	1.345	1.348	1.360	1.347	1.354	1.347	1.338	1.343	1.334	1.340	1.339	1.345
Pittsburgh, Pa.	1.378	1.369	1.367	1.376	1.378	1.383	1.379	1.367	1.364	1.370	1.358	1.355	1.370
Portland, Ore.	1.375	1.347	1.358	1.424	1.420	1.425	1.404	1.372	1.385	1.396	1.399	1.400	1.392
St. Louis, Mo.-Ill.	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
San Diego, Calif.	1.371	1.357	1.358	1.395	1.427	1.407	1.372	1.353	1.367	1.400	1.419	1.415	1.387
San Francisco, Calif.	1.448	1.431	1.447	1.481	1.501	1.490	1.472	1.444	1.453	1.487	1.492	1.483	1.469
Seattle-Everett, Wash.	1.342	1.308	1.294	1.344	1.371	1.377	1.373	1.356	1.361	1.379	1.383	1.379	1.356
Washington, D.C.	1.457	1.460	1.455	1.456	1.456	1.451	1.446	1.437	1.431	1.476	1.417	1.414	1.446

(NA—Data not adequate for publication)

Source: Bureau of Labor Statistics, Department of Commerce, Consumer and Energy Prices, 1984.

Residential No. 2 Prices for Selected States

(¢ gal., excluding taxes)

	Conn.	Me.	Mass.	N.H.	R.I.	Vt.	Del.	D.C.	Md.	N.J.	N.Y.	Pa.	Va.
1978 Average	50.1	48.6	48.8	50.3	50.7	50.8	47.8	50.7	49.2	49.6	50.1	48.8	49.1
1979 Average	72.0	68.8	70.9	72.5	72.8	72.5	68.2	74.2	70.1	71.0	71.2	69.8	70.4
1980 Average	98.3	96.3	97.8	100.4	101.1	101.5	95.4	102.6	97.9	97.9	98.2	96.4	98.5
1981 Average	121.7	120.4	121.3	123.7	123.8	125.4	117.3	127.4	121.4	121.5	123.2	118.1	120.5
1982 Average	118.3	115.5	117.6	117.4	120.1	120.1	111.3	124.5	117.1	117.4	120.5	113.7	117.7
1983													
January	119.5	109.0	116.3	111.6	116.2	121.5	110.5	122.8	115.4	115.7	120.6	113.7	116.0
February	115.8	103.7	113.2	105.5	112.2	116.9	108.2	119.7	112.6	110.4	117.6	109.6	112.0
March	108.3	97.4	105.4	100.8	106.8	109.6	103.9	115.3	108.2	104.6	110.2	104.0	106.9
April	104.5	99.5	104.4	100.9	106.8	110.6	103.0	113.1	107.9	104.4	106.9	101.8	106.7
May	105.9	101.6	107.0	102.6	109.6	111.2	104.6	112.9	108.6	105.5	108.2	103.3	107.2
June	104.3	102.6	105.9	101.2	112.0	112.8	107.3	114.7	108.3	104.6	110.5	102.2	106.8
July	104.2	102.6	105.3	104.3	109.1	112.3	107.8	112.8	107.2	104.5	109.9	101.3	107.4
August	103.8	105.6	105.4	103.5	107.9	111.7	102.5	113.3	107.0	105.5	110.0	101.6	107.7
September	103.8	103.8	106.2	104.0	108.1	111.0	103.5	113.9	108.1	106.1	110.5	102.8	108.1
October	104.3	102.9	105.6	103.1	108.0	109.4	103.5	113.4	108.7	105.4	110.3	103.3	104.8
November	104.1	101.8	106.1	101.5	108.7	109.8	103.7	113.5	108.8	104.6	110.2	103.7	104.9
December	105.6	102.2	108.1	103.7	109.4	110.0	105.5	114.7	109.2	106.7	110.9	104.6	105.2
1983 Average	109.1	102.8	109.1	104.1	110.5	112.9	106.0	117.0	110.3	107.9	112.1	105.8	108.7
1984													
January	115.7	110.2	114.4	114.0	113.7	116.6	114.8	122.0	115.6	114.1	118.3	112.9	111.4
February	121.7	112.6	119.7	117.8	117.5	118.9	118.4	128.6	121.9	119.5	124.3	117.4	117.5
March	114.5	103.3	113.1	108.8	111.7	115.1	111.1	122.6	116.2	113.5	117.0	110.9	112.6
April	113.4	103.3	112.4	107.7	110.7	113.3	109.9	119.9	115.6	110.6	116.0	107.8	110.8
May	112.5	102.7	112.5	108.8	111.4	112.2	109.0	119.5	113.0	109.1	114.5	105.8	111.1
June	110.6	103.7	110.5	104.5	110.8	112.8	107.2	116.3	109.9	107.1	115.0	103.3	108.7
July	107.4	102.5	107.3	101.9	109.3	108.6	103.7	116.5	109.0	104.9	112.8	99.7	107.2
August	104.7	98.0	105.5	98.6	106.0	108.0	103.7	109.8	105.2	103.6	110.2	99.6	105.2
September	105.4	99.1	106.0	101.0	105.9	106.9	102.1	109.9	106.7	104.3	109.3	100.9	105.9
October	106.2	101.9	106.9	102.2	107.4	108.0	103.5	111.8	107.5	105.7	111.9	101.5	106.7
November	107.2	100.6	107.2	102.7	106.5	107.5	103.3	111.9	108.2	105.2	111.7	102.9	107.1
December	106.4	97.9	107.0	103.1	107.1	106.4	102.8	112.9	107.1	104.9	111.3	103.2	107.6
1984 Average	112.1	103.9	111.6	108.4	111.4	111.9	109.6	118.8	113.5	111.0	115.5	107.9	110.5

	W.Va.	Ill.	Ind.	Mich.	Minn.	Ohio	Wisc.	Idaho	Ark.	Ore.	Wash.	U.S. ave.
1978 Average	46.2	46.5	48.5	47.9	47.8	47.4	44.7	43.6	53.2	45.8	48.6	49.0
1979 Average	65.1	68.8	72.7	70.9	72.4	68.6	67.3	62.1	68.2	68.0	69.7	70.4
1980 Average	92.2	95.8	99.6	97.8	99.9	91.9	91.5	91.6	97.8	97.3	100.8	97.4
1981 Average	115.0	114.9	118.5	118.3	118.4	113.2	109.1	110.4	118.0	111.4	116.5	119.4
1982 Average	109.3	110.9	114.3	113.9	115.1	110.2	107.8	110.4	117.4	111.6	117.6	116.0
1983												
January	105.6	103.8	105.7	110.6	107.8	107.9	108.5	109.1	114.6	113.6	117.7	115.0
February	104.7	99.5	102.8	108.5	101.6	104.4	104.5	104.8	NA	107.8	114.3	111.6
March	99.2	96.6	95.7	103.7	96.5	98.2	98.8	99.6	110.7	101.4	109.0	105.1
April	97.5	97.7	96.8	102.5	100.5	95.8	97.1	99.0	106.6	99.1	106.0	103.5
May	98.1	100.3	98.2	102.7	101.9	96.5	98.7	99.2	106.0	99.0	105.5	104.8
June	97.3	100.2	98.2	110.7	102.4	96.1	98.7	98.7	105.0	99.4	105.4	106.0
July	94.9	99.6	99.4	105.3	102.6	97.3	99.0	99.3	105.8	97.8	105.2	105.0
August	96.1	100.7	98.9	102.2	104.4	95.2	99.2	98.1	105.1	98.7	104.0	104.9
September	100.7	102.5	101.4	103.9	103.7	101.2	100.7	98.9	106.2	100.5	105.6	105.7
October	100.6	101.0	101.5	105.8	104.8	100.2	101.8	99.5	106.1	101.4	106.3	106.0
November	100.5	100.8	100.7	105.4	104.4	101.0	100.4	99.5	105.5	102.1	106.4	106.0
December	101.5	99.6	101.1	106.8	104.2	102.1	100.5	100.3	105.5	101.8	106.1	106.7
1983 Average	101.0	100.4	100.7	106.4	103.1	101.3	101.2	101.8	106.8	103.6	109.0	107.8
1984												
January	106.5	104.7	106.0	107.3	106.6	104.6	101.5	100.1	104.1	100.5	103.6	112.0
February	109.9	105.9	107.3	108.0	102.8	105.7	102.8	101.3	106.5	100.9	103.8	116.9
March	104.9	102.3	100.6	105.6	105.1	101.7	101.7	97.2	107.3	100.9	104.6	111.3
April	101.6	100.3	103.4	104.8	103.9	101.9	101.4	96.2	107.3	100.6	105.0	109.8
May	98.9	102.3	102.4	105.2	105.3	103.1	101.0	98.1	107.2	99.5	104.2	108.4
June	99.5	101.6	105.9	103.3	104.2	101.7	100.5	93.8	107.8	98.2	103.3	107.2
July	96.2	99.4	101.4	102.6	105.1	101.8	100.5	93.1	107.2	97.1	100.4	104.8
August	96.6	98.9	100.3	101.8	104.5	99.5	100.0	97.4	107.3	94.9	99.7	103.3
September	96.9	98.6	100.7	103.2	103.5	100.1	98.8	98.4	105.0	95.9	100.4	103.6
October	98.3	97.1	100.9	103.0	103.0	101.2	100.7	99.4	107.8	96.5	100.9	104.9
November	99.6	95.8	102.3	103.5	103.1	100.8	101.0	97.9	107.8	97.6	101.3	105.3
December	99.1	94.5	101.0	103.4	102.8	99.3	99.1	98.8	NA	97.3	100.6	104.8
1984 Average	102.0	100.1	103.2	105.0	104.1	102.1	101.0	98.5	106.9	99.3	102.7	109.1

Source: Energy Information Administration, Petroleum Marketing Monthly, December 1984.

Gasoline Prices by Grades and Months

(U.S. averages, retail, including taxes, in ¢ per gal.)

		Leaded Regular	Unleaded Regular	UnLeaded Premium (a)	Average for All Types
1984	January	113.1	121.6	136.9	120.0
	February	112.5	120.9	136.1	119.3
	March	112.5	121.0	136.2	119.4
	April	114.5	122.7	137.5	121.1
	May	115.4	123.6	138.0	122.1
	June	114.7	122.9	137.7	121.4
	July	112.9	121.2	137.0	119.7
	August	111.6	119.6	135.5	118.4
	September	112.0	120.3	136.0	118.9
	October	112.7	120.9	136.5	119.5
	November	112.4	120.7	136.4	119.3
	December	110.9	119.3	135.4	117.9
	Average	**112.9**	**121.2**	**136.6**	**119.8**
1983	January	114.6	122.8	137.6	121.3
	February	109.9	118.7	133.8	117.0
	March	106.4	115.1	130.8	113.5
	April	113.1	121.5	136.0	119.8
	May	117.7	125.9	139.7	124.3
	June	119.7	127.7	141.1	126.1
	July	120.7	128.8	142.1	127.2
	August	120.3	128.5	141.9	126.9
	September	118.9	127.4	141.0	125.7
	October	117.2	125.5	139.5	123.9
	November	115.6	124.1	138.4	122.4
	December	114.6	123.1	137.6	121.5
	Average	**115.7**	**124.1**	**138.3**	**122.5**
1982	January	128.5	135.8	146.6	134.1
	February	126.0	133.4	144.8	131.8
	March	120.6	128.4	140.8	126.8
	April	114.8	122.5	135.1	121.0
	May	116.6	123.7	135.5	122.4
	June	124.2	130.9	141.8	129.6
	July	126.3	133.1	144.3	131.8
	August	125.4	132.3	143.9	131.0
	September	123.6	130.8	142.9	129.5
	October	121.9	129.5	142.1	128.0
	November	120.7	128.3	142.1	126.8
	December	118.1	126.0	139.4	124.4
	Average	**122.2**	**129.6**	**141.5**	**128.1**
Average	1981 (b)	131.1	137.8	141.5 (a)	128.1
	1980	119.1	124.5	128.1 (a)	122.1
	1979	85.7	90.3	92.2 (a)	88.2
	1978	62.6	67.0	69.4 (a)	65.2
	1977	62.2	65.6	67.4 (a)	NA
	1976	59.0	61.4	63.6 (a)	NA
	1975	56.7	NA	60.9 (a)	NA
	1974	53.2	NA	56.9 (a)	NA

(a) In January, 1984, this series was switched from leaded premium to unleaded premium to reflect changing market conditions. The monthly columns for 1983 and 1982 have been revised to unleaded status.

(b) Data for 1981 and earlier are for leaded premium. Beginning in September 1981, Bureau of Labor Statistics changed the weights used in the calculation of average motor gasoline prices. In the fourth column above, gasohol is included and unleaded premium is weighted more heavily.

Source: Department of Energy, Monthly Energy Review, March 1985.

Wholesale Price Trends Through 1983

	Refinery products in eight refinery markets representing total U.S.						Crude	
					Average 4 products			
Year	Motor gasoline ¢ gal.	Kero-sine ¢ gal.	Light fuel ¢ gal.	Heavy fuel ¢ gal.	¢ gal.	$/bbl.	8 areas $/bbl.	Products vs. crude $/bbl.
1984 (a)	77.87	84.75	79.62	59.14	72.86	30.60	25.880	4.72
1983	83.75	85.12	80.05	57.30	75.33	31.64	26.190	5.51
1982	92.90	97.18	91.95	57.80	82.44	34.62	28.520	6.10
1981	101.63	101.03	97.20	61.17	88.75	37.28	31.770	5.51
1980	87.40	80.26	78.21	44.43	72.77	30.56	21.190	9.38
1979	56.84	56.50	54.47	33.63	49.50	20.79	12.640	8.15
1978	39.22	37.23	35.66	23.00	33.72	14.16	9.000	5.16
1977	36.99	35.81	34.41	25.87	32.21	13.95	8.570	5.38
1976	33.82	31.67	30.38	21.66	29.55	12.41	8.141	4.26
1975	30.27	27.41	26.09	22.03	27.03	11.35	7.560	3.79
1973	14.72	14.08	12.61	8.45	12.49	5.25	3.885	1.365
1971	12.70	12.90	10.75	7.76	10.94	4.59	3.385	1.205
1970	12.33	12.43	10.45	6.14	10.20	4.28	3.177	1.103
1965	11.52	11.28	9.04	4.81	9.12	3.83	2.864	0.966

(a) Preliminary

Source: Independent Petroleum Assn. of America. Product figures reflect trends in prices but not the actual sales realizations for producers or refiners.

Supplier Gasoline Prices, by Type of Seller

(¢ per gal., excluding taxes)

	Major Refiners			Other Refiners and Gas Plant Operators			Average		
	Sales to End-Users			Sales to End-Users			Sales to End-Users		
Year Month	Through Company Outlets(a)	Other End-Users	Sales for Resale	Through Company Outlets(a)	Other End-Users	Sales for Resale	Through Company Outlets(a)	Other End-Users	Sales for Resale
1978 Average	**49.4¢**	**46.2¢**	**43.8¢**	**48.2¢**	**45.8¢**	**42.1¢**	**48.9¢**	**45.1¢**	**43.4¢**
1979 Average	**72.8**	**68.0**	**64.3**	**71.0**	**67.5**	**61.8**	**72.1**	**67.9**	**63.7**
1980 Average	**105.6**	**98.7**	**95.1**	**103.0**	**97.8**	**91.3**	**104.6**	**98.5**	**94.1**
1981 Average	**117.0**	**109.4**	**107.5**	**114.2**	**108.4**	**103.2**	**115.9**	**109.2**	**106.4**
1982 Average	**108.2**	**101.1**	**98.3**	**105.6**	**100.2**	**94.3**	**107.2**	**100.9**	**97.3**
1983									
January	99.0	93.2	89.6	96.3	90.9	85.5	98.0	92.9	88.5
February	94.4	88.5	86.2	91.9	86.9	83.0	93.4	88.3	85.4
March	91.7	84.8	83.7	90.0	86.4	80.5	91.1	84.9	82.9
April	94.9	88.8	87.0	97.7	87.8	84.8	95.9	88.7	86.5
May	98.5	91.4	90.9	96.9	89.7	88.6	98.0	91.3	90.4
June	99.6	93.4	92.1	97.6	92.2	89.3	98.9	93.2	91.5
July	100.2	95.1	93.1	98.2	93.2	89.6	99.5	94.9	92.3
August	99.8	94.2	92.3	98.1	93.6	88.9	99.2	94.1	91.5
September	98.8	91.8	91.0	95.5	90.5	87.6	98.0	91.7	90.2
October	97.0	90.8	88.9	94.9	88.2	85.2	96.3	90.6	88.1
November	95.5	89.6	87.5	93.2	88.0	83.6	94.7	89.5	86.6
December	94.1	87.4	84.8	91.7	86.5	80.4	93.2	87.3	83.8
1983 Average	**97.0**	**90.6**	**89.0**	**95.2**	**89.7**	**85.6**	**96.4**	**90.5**	**88.2**
1984									
January	92.0	86.4	84.0	89.8	85.5	80.3	91.3	86.2	83.2
February	91.4	86.3	84.5	89.4	86.9	81.4	90.8	86.4	83.8
March	92.0	86.0	85.4	90.3	86.5	82.6	91.4	86.1	84.7
April	94.0	88.7	87.6	92.6	88.6	84.6	93.6	88.7	86.9
May	94.4	88.7	87.5	93.3	88.2	83.8	94.1	88.6	86.6
June	93.8	86.8	85.5	92.1	87.8	81.2	93.3	86.9	84.5
July	91.9	85.0	82.7	89.5	82.1	78.5	91.1	84.6	81.7
August	90.8	83.8	82.0	88.0	80.8	78.1	89.9	83.4	81.1
September	91.3	84.4	83.7	89.0	82.5	79.8	90.6	84.1	82.8
October	91.9	85.6	84.5	89.7	84.5	80.6	91.2	85.4	83.6
November	91.4	84.8	83.0	88.8	83.6	78.4	90.6	84.6	81.9
December	89.8	79.1	79.5	87.1	80.2	73.2	89.0	79.2	78.0
1984 Average	**92.0**	**85.4**	**84.2**	**90.0**	**84.9**	**80.2**	**91.4**	**85.4**	**83.2**

Supplier Gasoline Prices, by Grade and Type

(¢ per gal., excluding taxes)

	Leaded Regular			Unleaded Regular			Premium		
	Sales to End-Users			Sales to End-Users			Sales to End-Users		
Year Month	Through Company Outlets(a)	Other End-Users	Sales for Resale	Through Company Outlets(a)	Other End-Users	Sales for Resale	Through Company Outlets(a)	Other End-Users	Sales for Resale
1983									
January	92.8¢	90.8¢	85.4¢	99.8¢	93.5¢	89.8¢	110.4¢	98.1¢	96.7¢
February	88.4	86.1	82.5	95.1	89.0	86.7	106.0	94.3	93.7
March	85.7	82.2	80.0	92.6	86.7	84.3	104.7	91.6	91.3
April	91.1	86.7	83.6	97.7	89.4	87.9	106.1	93.6	94.4
May	93.0	88.8	87.3	99.6	93.2	91.8	109.3	97.1	98.6
June	93.8	90.7	88.3	100.6	94.7	93.0	110.4	98.2	99.7
July	94.[illegible]	92.7	89.1	101.2	95.7	93.7	110.3	99.5	100.7
August	94.2	92.0	88.3	100.7	94.5	92.7	110.1	99.0	99.9
September	92.9	89.8	87.0	99.4	91.9	91.4	109.4	96.7	98.3
October	91.0	88.6	84.9	97.7	90.8	89.2	107.8	95.6	96.1
November	89.2	87.0	83.3	96.2	90.0	87.8	106.6	94.4	94.8
December	87.5	84.6	80.3	94.6	86.4	84.8	105.2	94.3	92.3
1983 Average	**91.2**	**88.1**	**85.0**	**98.0**	**91.5**	**89.5**	**108.0**	**96.1**	**96.4**
1984									
January	85.6	83.7	79.5	92.5	87.0	84.3	101.4	94.4	91.7
February	84.9	83.9	80.3	91.9	87.0	85.0	101.7	95.3	92.0
March	85.4	83.4	81.3	92.5	87.4	85.9	102.5	94.5	92.8
April	87.6	86.0	83.3	94.5	89.7	88.2	104.3	96.9	95.1
May	88.1	85.7	82.9	94.9	90.0	87.8	104.5	97.4	95.0
June	87.2	84.3	80.7	94.1	87.7	85.7	103.7	94.8	92.7
July	84.7	81.8	78.0	91.8	85.3	82.6	101.9	92.2	90.0
August	83.4	80.6	77.3	90.6	84.0	82.1	101.5	92.2	89.5
September	83.9	81.5	78.9	91.3	84.8	83.8	101.5	93.0	91.2
October	84.6	82.4	79.7	91.8	86.6	84.5	102.0	93.6	92.0
November	83.8	81.6	77.8	91.0	85.5	82.9	101.1	91.9	90.6
December	81.8	74.5	73.5	89.3	82.0	78.9	99.9	89.8	87.2
1984 Average	**85.1**	**82.4**	**79.5**	**92.2**	**86.4**	**84.2**	**102.1**	**93.7**	**91.6**

(a) Through company-operated retail outlets.

Source: Energy Information Administration, Petroleum Marketing Monthly, December 1984, Published February 1985.

Supplier Product Prices For Resale

(¢ per gal., excluding taxes)

						No. 2 Distillate					
Year Month	Finished Motor Gasoline	Finished Aviation Gasoline	Kerosine-Type Jet Fuel	Kerosine	No. 1 Distillate	No. 2 Fuel Oil	No. 2 Diesel Fuel	Average	No. 4 Fuel	Residual Fuel Oil	Propane (Consumer Grade)
1978 Average	**43.4¢**	**53.7¢**	**38.6¢**	**40.4¢**	**40.6¢**	**36.9¢**	**36.5¢**	**36.7¢**	**30.5¢**	**26.3¢**	**23.7¢**
1979 Average	**63.7**	**72.1**	**66.0**	**62.4**	**58.3**	**56.9**	**57.4**	**57.1**	**47.0**	**39.9**	**29.1**
1980 Average	**94.1**	**112.8**	**86.8**	**86.4**	**88.0**	**80.3**	**80.1**	**80.2**	**67.0**	**52.8**	**41.5**
1981 Average	**106.4**	**125.0**	**101.2**	**106.6**	**107.1**	**97.6**	**97.2**	**97.4**	**78.3**	**66.3**	**46.6**
1982 Average	**97.3**	**122.8**	**95.3**	**101.8**	**103.8**	**91.4**	**91.4**	**91.4**	**73.7**	**61.2**	**42.7**
1983											
January	88.5	124.8	91.8	94.2	94.0	85.7	85.5	85.7	81.7	60.3	47.0
February	85.4	123.7	89.9	90.0	89.0	80.1	80.7	80.3	76.8	58.5	46.7
March	82.9	121.2	84.5	83.1	84.5	76.0	75.2	75.7	72.5	57.7	47.4
April	86.5	120.0	82.9	84.2	86.0	78.9	76.8	78.0	74.1	57.7	50.0
May	90.4	120.2	84.3	87.7	88.5	80.9	80.2	80.5	72.1	59.2	50.5
June	91.5	115.0	84.1	84.6	86.8	80.9	80.3	80.6	72.9	60.2	50.9
July	92.3	115.2	84.8	85.2	86.9	81.7	80.8	81.2	70.0	62.2	50.7
August	91.5	114.7	85.4	86.7	90.1	83.4	81.7	82.5	70.2	63.8	49.8
September	90.2	113.7	86.3	91.9	92.0	85.1	83.5	84.2	69.8	64.6	50.1
October	88.1	118.9	86.4	90.8	92.1	83.5	83.0	83.2	67.9	64.7	49.9
November	86.6	118.7	84.4	90.4	90.2	82.6	82.0	82.4	70.2	63.6	47.3
December	83.8	118.8	83.6	88.6	88.4	80.7	80.1	80.5	71.4	62.3	45.4
1983 Average	**88.2**	**117.8**	**85.4**	**89.2**	**89.6**	**81.5**	**80.8**	**81.2**	**72.6**	**60.9**	**48.4**
1984											
January	83.2	116.7	86.4	95.9	92.5	87.5	82.6	85.9	72.0	64.8	47.7
February	83.8	116.5	86.5	100.4	94.8	89.2	84.5	87.3	71.6	67.5	47.4
March	84.7	117.1	84.6	91.5	89.1	81.3	81.0	81.2	75.5	64.5	45.3
April	86.9	116.8	84.2	90.7	88.6	82.8	80.8	81.9	72.7	66.2	44.6
May	86.6	117.1	84.3	90.9	89.3	83.2	81.9	82.5	70.4	66.0	44.4
June	84.5	116.8	84.2	88.1	90.5	82.4	81.9	82.1	70.1	67.2	44.1
July	81.7	117.2	82.8	87.6	91.6	79.4	79.3	79.4	68.0	65.0	42.3
August	81.1	116.7	81.0	86.0	85.3	77.8	77.7	77.7	65.7	63.6	43.2
September	82.8	116.8	81.7	88.8	85.6	80.0	78.4	79.2	67.9	64.5	44.8
October	83.6	116.4	82.9	88.9	88.2	80.8	80.0	80.4	67.8	65.1	46.1
November	81.9	114.8	81.4	88.0	87.5	79.4	79.0	79.3	71.7	64.6	45.6
December	78.0	114.0	80.1	86.4	86.0	77.1	77.0	77.1	70.6	64.6	43.0
1984 Average	**83.2**	**116.5**	**83.0**	**91.6**	**89.2**	**82.1**	**80.3**	**81.3**	**70.7**	**65.4**	**45.0**

Supplier Product Prices to End-Users

(¢ per gal., excluding taxes)

						No. 2 Distillate					
Year Month	Finished Motor Gasoline	Finished Aviation Gasoline	Kerosine-Type Jet Fuel	Kerosine	No. 1 Distillate	No. 2 Fuel Oil	No. 2 Diesel Fuel	Average	No. 4 Fuel	Residual Fuel Oil	Propane (Consumer Grade)
1978 Average	**48.4¢**	**51.6¢**	**38.7¢**	**42.1¢**	**40.9¢**	**40.0¢**	**37.7¢**	**39.6¢**	**31.1¢**	**29.8¢**	**33.5¢**
1979 Average	**71.3**	**68.9**	**54.7**	**58.5**	**57.2**	**51.6**	**58.5**	**55.1**	**47.9**	**43.6**	**35.7**
1980 Average	**103.5**	**108.4**	**86.8**	**90.2**	**83.4**	**78.8**	**81.8**	**80.4**	**68.2**	**60.7**	**48.2**
1981 Average	**114.7**	**130.3**	**102.4**	**112.3**	**103.9**	**91.4**	**99.5**	**95.8**	**79.7**	**75.6**	**56.5**
1982 Average	**106.0**	**131.2**	**96.3**	**108.9**	**102.3**	**90.5**	**94.2**	**92.5**	**75.0**	**67.6**	**59.2**
1983											
January	97.1	129.2	94.5	104.5	100.8	100.9	89.2	91.9	81.0	64.2	72.7
February	92.5	127.2	92.6	101.4	95.4	97.0	84.0	86.6	77.3	62.0	71.7
March	89.8	126.6	90.6	97.1	91.2	93.0	78.0	80.1	76.6	60.9	68.1
April	94.7	125.2	88.8	93.4	92.0	89.1	78.8	80.2	77.9	61.0	68.6
May	96.6	125.4	87.8	93.8	94.4	89.5	81.8	82.5	75.7	63.2	72.2
June	97.8	125.6	86.3	90.0	97.9	87.3	81.5	82.0	74.7	64.7	67.3
July	98.8	125.1	85.6	89.0	99.9	85.1	82.0	82.3	75.2	65.9	66.4
August	98.4	125.9	85.5	90.8	99.0	86.1	83.0	83.3	75.8	67.7	68.9
September	96.9	124.2	86.1	92.7	99.5	88.0	84.8	85.2	75.3	69.0	74.9
October	95.4	124.7	86.0	98.9	98.0	89.0	84.2	84.7	73.0	68.7	69.6
November	93.9	124.5	85.8	100.0	95.4	90.1	83.5	84.5	77.4	67.4	72.8
December	92.4	124.4	85.5	96.6	92.5	92.1	82.2	84.0	75.8	67.2	76.4
1983 Average	**95.4**	**125.5**	**87.8**	**96.1**	**96.2**	**91.6**	**82.6**	**83.9**	**76.6**	**65.1**	**70.9**
1984											
January	90.6	123.9	85.8	106.8	95.3	97.7	84.4	87.5	82.1	69.0	76.8
February	90.2	123.7	86.5	117.9	99.9	104.6	87.4	91.2	80.8	70.4	76.3
March	90.7	123.8	85.6	111.3	93.8	94.7	83.2	85.6	80.2	68.5	76.4
April	92.9	124.4	85.1	105.8	93.5	91.9	82.4	83.7	77.9	69.1	76.5
May	93.4	123.9	85.2	102.4	93.7	90.9	83.2	84.1	80.8	69.5	70.4
June	92.5	124.6	84.5	94.3	92.6	86.9	84.0	84.4	80.7	71.0	70.6
July	90.4	124.3	84.1	90.6	91.7	84.3	81.3	81.6	79.6	69.0	69.6
August	89.2	123.2	83.4	92.8	88.4	82.8	79.7	80.1	74.2	67.1	71.9
September	89.7	123.7	83.1	99.2	89.9	84.3	80.2	80.7	79.4	67.5	73.4
October	90.5	123.3	83.2	102.7	90.5	87.3	81.6	82.3	79.4	67.8	74.1
November	89.9	119.3	82.4	106.1	90.7	87.7	80.7	81.8	79.6	67.9	73.8
December	87.7	121.9	82.2	101.4	88.5	88.1	79.4	81.1	79.8	67.7	70.0
1984 Average	**90.6**	**123.4**	**84.2**	**103.6**	**92.7**	**91.6**	**82.3**	**83.7**	**79.6**	**68.7**	**73.6**

Source: Energy Information System, Petroleum Marketing Monthly, December 1984. Published in February 1985.

Supplier Prices of No. 2 Distillate Fuel Oil

(¢ per gal., excluding taxes)

	Sales to End-Users						
Year Month	**To Residential Consumers**	**To Commercial/ Institutional Consumers**	**To Industrial Consumers**	**Sales Through Company-Operated Retail Outlets(a)**	**To Other End-Users(b)**	**Average**	**Sales for Resale**
1983							
January	115.0¢	94.2¢	95.0¢	97.3¢	94.9¢	103.2¢	86.0¢
February	111.6	87.7	89.3	95.8	90.6	98.1	81.3
March	105.1	82.1	84.5	91.6	85.7	90.5	76.1
April	103.5	82.7	85.0	96.1	87.2	90.3	78.9
May	104.8	84.8	87.7	94.4	89.7	90.4	81.4
June	106.0	84.8	87.4	95.2	89.4	89.9	81.7
July	105.0	84.9	87.4	94.0	90.2	89.4	82.1
August	104.9	85.6	88.7	94.1	90.3	90.0	83.2
September	105.7	87.5	89.8	94.2	91.4	92.1	84.8
October	106.0	87.3	89.3	93.7	91.3	92.8	83.9
November	106.0	87.2	88.7	93.2	89.8	93.7	83.0
December	106.7	87.6	87.4	92.4	87.7	95.6	80.7
1983 Average	**107.8**	**86.3**	**88.3**	**94.3**	**89.7**	**93.3**	**81.8**
1984							
January	112.0	90.3	91.2	95.6	90.8	99.6	86.1
February	116.9	92.1	92.6	96.0	92.7	101.1	87.9
March	111.3	87.5	88.5	93.3	88.8	96.3	82.0
April	109.8	85.7	88.0	93.0	90.3	93.0	82.6
May	108.4	86.3	88.1	93.0	92.1	91.9	83.1
June	107.2	86.2	87.5	92.7	91.2	90.6	82.7
July	104.8	83.6	85.7	91.5	88.7	88.0	80.1
August	103.3	82.3	85.0	90.8	86.5	87.1	78.5
September	103.6	83.0	85.3	90.7	88.1	88.6	79.9
October	104.9	84.2	85.7	90.5	89.3	89.9	81.0
November	105.3	83.4	85.0	89.8	87.6	90.8	79.8
December	104.8	82.7	83.5	89.3	84.6	91.0	77.8
1984 Average	**109.1**	**85.7**	**87.0**	**92.0**	**89.2**	**92.6**	**81.9**

(a) No. 2 Diesel Fuel only; (b) Agriculture, utilities, etc.

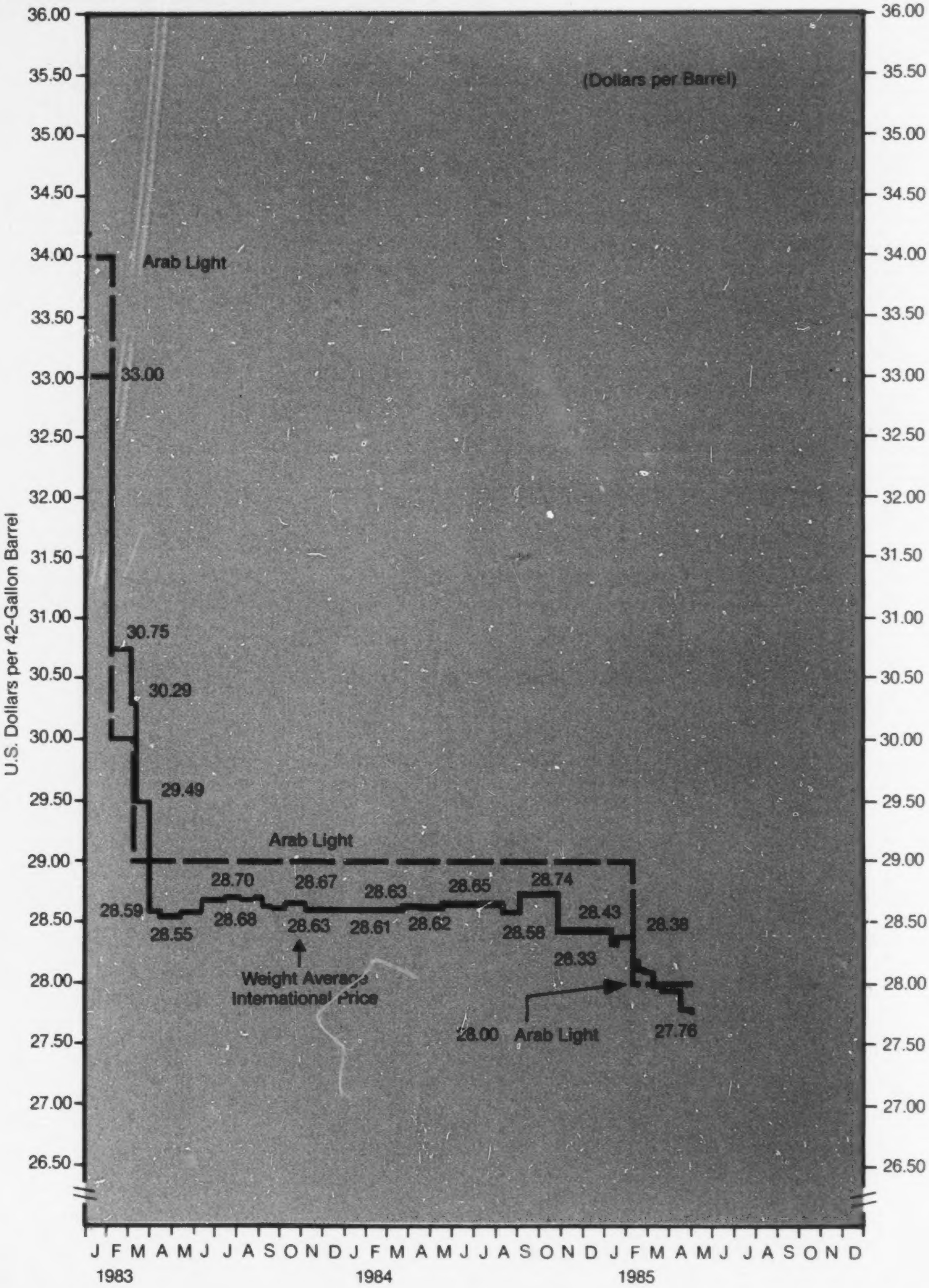
Supplier Prices of Residual Fuel Oil

(¢ per gal., excluding taxes)

	Residual Fuel Oil, Sulfur Content Less Than or Equal to 1%		Residual Fuel Oil, Sulfur Content Greater Than 1%		Average	
Year Month	**Sales to End-Users**	**Sales for Resale**	**Sales to End-Users**	**Sales for Resale**	**Sales to End-Users**	**Sales for Resale**
1978 Average	**31.4¢**	**29.3¢**	**27.5¢**	**24.5¢**	**29.8¢**	**26.3¢**
1979 Average	**46.8**	**45.0**	**38.9**	**36.6**	**43.6**	**39.9**
1980 Average	**67.5**	**60.8**	**52.3**	**47.9**	**60.7**	**52.8**
1981 Average	**82.9**	**74.8**	**67.3**	**62.2**	**75.6**	**66.3**
1982 Average	**74.7**	**69.5**	**61.1**	**57.2**	**67.6**	**61.2**
1983						
January	70.5	65.0	60.1	57.0	64.2	60.3
February	66.0	63.0	58.5	55.7	62.0	58.5
March	66.2	60.0	57.0	55.9	60.9	57.7
April	64.3	60.1	58.7	56.5	61.0	57.7
May	66.9	62.6	59.7	57.8	63.2	59.2
June	69.2	63.2	60.1	58.5	64.7	60.2
July	70.4	65.2	61.4	60.5	65.9	62.2
August	71.6	66.7	63.2	62.0	67.7	63.8
September	72.6	67.0	65.3	63.3	69.0	64.6
October	72.1	68.8	64.9	62.6	68.7	64.7
November	70.7	66.5	64.4	62.2	67.4	63.6
December	72.0	67.3	63.1	60.2	67.2	62.3
1983 Average	**69.5**	**64.3**	**61.1**	**59.1**	**65.1**	**60.9**
1984						
January	73.6	71.0	64.6	62.3	69.0	64.8
February	75.1	71.4	65.8	65.7	70.4	67.5
March	73.1	70.5	64.7	61.9	68.5	64.5
April	73.1	69.2	66.5	64.7	69.1	66.2
May	72.7	68.3	67.4	65.0	69.5	66.0
June	73.2	69.8	68.9	66.1	71.0	67.2
July	71.5	66.8	66.7	64.0	69.0	65.0
August	69.5	65.6	65.0	62.7	67.1	63.6
September	70.0	65.9	64.9	63.8	67.5	64.5
October	70.8	66.8	65.8	64.3	67.8	65.1
November	70.4	66.8	65.8	63.6	67.9	64.6
December	70.5	67.5	65.6	63.3	67.7	64.6
1984 Average	**72.0**	**68.5**	**65.9**	**63.9**	**68.7**	**65.4**

Source: Energy Information Administration, Petroleum Marketing Monthly, December 1984, published in February 1985.

World Crude Oil Prices [1]



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[1] Internationally traded oil only. Average price (FOB) weighted by estimated export volume.
As of 04/23/85 Weekly Petroleum Status Report/Energy Information Administration.

Spot Market Product Prices

($ per bbl.)

		Motor Gasoline		Gasoil/Heating Oil		Residual Fuel Oil	
		Rotterdam (98-Octane)	New York (89-Octane)	Rotterdam (0.5% Sulfur)	New York (0.2% Sulfur)	Rotterdam (1% Sulfur)	New York (1% Sulfur)
1985							
Jan.	4	27.72	28.27	29.35	29.76	28.22	28.25
	11	27.43	28.58	31.09	30.87	28.30	28.25
	18	27.02	28.50	32.23	32.76	28.67	29.25
	25	26.84	29.23	31.76	31.19	28.75	29.45
Feb.	1	26.96	30.43	32.30	31.19	28.15	29.25
	8	27.43	31.29	32.30	31.71	28.75	29.50
	15	28.42	31.29	34.04	31.92	29.20	29.50
	22	29.01	31.84	34.04	32.24	28.97	29.50
Mar.	1	28.78	31.50	31.43	32.34	27.62	29.50
	8	28.83	31.61	32.37	32.76	26.42	28.65
	15	29.42	31.61	32.10	33.12	26.42	27.35
	22	30.48	33.60	32.10	35.81	24.62	27.00
	29	30.59	33.71	32.50	35.39	25.30	26.75
Apr.	5	31.94	34.65	32.10	34.13	25.37	26.65
	12	33.35	34.65	31.56	32.97	25.30	26.25
	19	33.24	34.23	30.83	32.66	25.08	26.00
	26	33.00	34.34	31.03	32.66	23.94	25.75
1984							
Jan.	6	30.72	32.57	33.78	35.28	28.15	29.75
	13	30.25	32.34	33.85	36.12	27.78	30.15
	20	31.65	34.17	34.38	41.79	28.00	30.25
	27	32.24	33.43	35.12	44.10	27.85	31.25
Feb.	3	31.48	34.69	34.79	42.42	28.23	31.50
	10	31.48	33.64	33.51	38.01	28.60	31.00
	17	31.48	33.85	33.04	34.23	28.53	30.75
	24	31.89	33.18	33.24	32.55	28.53	30.25
Mar.	2	33.59	34.86	33.71	33.08	28.53	29.25
	9	33.47	35.01	33.98	32.86	28.30	29.25
	16	33.82	34.69	34.38	32.55	28.30	29.00
	23	33.29	34.38	34.12	33.50	28.15	28.75
	30	32.77	35.87	34.12	34.76	28.00	28.75
Apr.	6	33.06	35.26	34.12	35.91	28.60	29.25
	13	33.06	35.15	33.31	36.02	28.15	29.40
	20	32.53	34.08	32.91	36.12	27.85	29.40
	27	32.36	33.73	32.84	36.02	27.85	29.40
May	4	31.65	33.96	32.17	35.80	27.85	29.25
	11	31.59	33.75	31.97	36.12	28.00	29.25
	18	32.59	33.85	33.18	35.70	28.53	29.40
	25	33.18	33.52	33.18	34.12	28.45	29.85
Jun.	1	33.35	33.10	33.71	34.23	28.45	30.00
	8	33.00	32.68	33.04	33.81	27.78	29.90
	15	32.12	32.05	31.70	32.34	27.85	29.75
	22	31.18	31.10	31.23	32.13	27.40	29.25
	29	30.13	32.05	30.70	32.30	27.03	28.75
Jul.	6	Not available.					
	13	31.36	32.03	30.76	32.28	27.18	29.00
	20	30.66	31.29	30.16	31.92	27.18	28.75
	27	29.95	30.98	29.09	30.66	27.18	28.50
Aug.	3	29.31	32.24	29.76	31.71	27.18	27.75
	10	30.54	32.09	30.50	31.71	27.18	27.50
	17	31.24	32.02	30.83	32.02	27.18	27.75
	24	31.13	32.13	32.10	32.97	27.18	28.00
	31	31.13	32.34	31.97	32.55	27.25	28.65
Sep.	7	31.01	32.76	31.17	33.08	27.18	28.75
	14	30.95	32.82	31.84	33.39	27.48	28.75
	21	30.95	33.18	32.37	33.81	28.00	28.75
	28	30.95	33.01	32.84	34.23	28.00	28.70
Oct.	5	30.77	32.91	33.11	34.02	28.30	28.75
	12	30.89	33.54	32.31	33.08	28.60	28.75
	19	29.95	30.68	29.83	30.24	28.38	28.75
	26	29.60	30.68	31.70	32.34	27.78	28.25
Nov.	2	29.60	31.46	31.37	32.34	27.78	28.25
	9	29.43	30.64	32.44	32.55	27.78	28.25
	16	29.43	30.03	32.10	32.02	28.60	28.70
	23	29.37	29.65	32.31	32.13	28.68	28.90
	30	28.78	28.92	29.96	31.50	27.93	28.80
Dec.	7	28.84	29.25	30.43	32.13	27.93	28.80
	14	28.19	28.37	29.96	31.18	27.93	29.00
	21	27.73	28.10	29.76	30.34	28.23	29.00
	28	Not available.					

International Prices for Gasoline and Fuel Oil

(U.S. dollars per gal. for gasoline; per 42-gal. bbl. for fuel oil)

	1/1/84				7/1/83				1/1/83			
	Gasoline		Fuel Oil		Gasoline		Fuel Oil		Gasoline		Fuel Oil	
Country	Reg.	Prem.	Dist.	Resid.	Reg.	Prem.	Dist.	Resid.	Reg.	Prem.	Dist.	Resid.
WESTERN HEMISPHERE												
Argentina	1.40	NR	27.51	18.69	1.16	NR	25.58	14.53	.90	1.00	17.05	10.87
Bolivia	.45	.76	19.07	NA	.47	.66	17.49	NA	.47	.66	17.49	NR
Brazil	2.00	NA	24.04	26.83	2.21	NA	21.90	24.41	2.47	NR	36.39	26.84
Canada	1.44	1.33	NA	NA	1.42	1.54	NA	NA	1.34	1.46	NR	33.61
Chile	1.70	1.79	59.62	45.00	1.74	1.84	60.89	42.57	NR	2.47	36.39	28.64
Colombia	.84	.85	NA	NA	.85	.96	NA	NA	.95	1.08	NR	NR
Dominican Republic	NA	2.30	47.04	30.24	NA	2.30	47.04	30.24	NA	NA	NA	NA
Ecuador	.55	.73	NA	9.24	.62	.83	NA	8.30	.91	1.21	NR	8.91
Jamaica	2.21	2.27	62.53	32.11	1.76	1.81	49.42	28.13	2.12	2.17	55.15	34.03
Mexico	.69	.94	18.37	4.96	.61	.89	15.00	2.40	.51	.76	10.71	36.40
Panama Republic	2.14	2.28	NA	NA	2.14	2.28	NA	NA	2.18	2.32	NR	NR
Paraguay	3.08	4.02	61.11	43.72	3.08	4.02	61.11	43.72	4.81	6.01	68.77	55.52
Peru	.97	1.09	28.90	26.54	1.04	1.07	NA	30.98	1.01	1.21	33.02	29.43
United States	1.13	1.37	38.30	30.91	1.21	1.42	36.71	29.57	1.15	1.35	42.42	27.05
Uruguay	2.49	3.05	NA	29.76	2.28	2.81	NA	22.50	NA	NA	NA	NA
Venezuela	.26	.88	2.40	1.78	.26	.88	2.40	1.78	.26	.88	2.40	1.78
WESTERN EUROPE												
Austria	2.16	2.26	NA	30.56	2.18	2.29	NA	26.90	2.40	2.49	NR	29.46
Belgium	2.17	2.24	45.53	33.21	2.43	2.51	44.51	32.01	2.53	2.64	54.77	36.71
Denmark	2.37	2.40	56.10	41.75	2.53	2.56	56.42	40.23	2.83	2.86	70.29	45.03
Finland	2.35	2.44	70.88	25.68	2.39	2.48	72.12	26.10	NR	NR	NR	NR
France	2.08	2.24	45.90	29.17	2.25	2.39	50.62	27.81	2.51	2.68	60.73	30.57
Germany, West	1.80	1.88	36.02	26.40	1.89	2.00	37.38	24.21	2.14	2.27	46.84	30.17
Greece	1.70	1.85	38.00	21.63	2.05	2.22	45.83	26.09	2.47	2.68	NR	30.37
Italy	2.85	2.96	57.47	30.98	2.81	2.93	56.03	30.11	3.16	3.30	64.21	37.22
Luxembourg	1.79	1.85	44.18	30.11	NA	NA	NA	NA	1.85	1.92	45.73	27.51
Netherlands	2.24	2.30	NA	NA	2.44	2.52	NA	NA	2.36	2.44	NR	36.05
Norway	2.42	2.49	NA	NA	NA	NA	NA	NA	2.67	2.73	60.94	38.90
Portugal	2.56	2.70	65.54	24.19	2.61	2.71	62.28	23.42	2.98	3.15	62.48	28.07
Spain	2.10	2.30	58.85	23.75	1.96	2.17	54.18	24.39	2.38	2.69	65.93	30.76
Sweden	2.02	2.07	1.03	1.03	2.00	2.05	1.03	1.18	2.18	2.24	50.19	44.31
Switzerland	NA	NA	NA	NA	2.22	2.15	38.75	27.42	2.29	2.37	43.25	28.43
Turkey	1.70	1.83	48.15	32.66	1.73	1.82	51.89	33.23	NR	NR	NR	NR
United Kingdom	NA	2.31	NA	NA	NA	2.31	NA	28.75	NR	NR	NR	NR
Yugoslavia	2.05	2.14	28.13	25.97	2.05	2.18	37.30	34.31	2.32	2.44	48.70	44.85
MIDDLE EAST												
Israel	NA	NA	NA	NA	2.05	2.26	63.50	29.05	2.18	2.37	67.89	30.78
Saudi Arabia	.17	.23	NA	NA	.18	.24	1.62	2.02	.18	.24	1.62	2.02
AFRICA												
Ethiopia	2.18	2.36	46.58	NA	2.18	2.36	45.58	NA	2.18	2.36	45.58	26.43
Ghana	.85	.97	19.58	21.68	.59	.69	16.04	16.93	3.42	3.73	58.03	43.39
Kenya	NA	NA	NA	NA	2.13	2.27	39.54	24.14	NA	NA	NA	NA
Morocco	2.32	2.42	32.09	30.21	2.56	2.57	NA	30.94	2.72	2.84	38.50	32.37
South Africa, Rep. of	2.50	2.57	78.27	46.94	NA	NA	NA	NA	2.14	2.17	68.67	37.86
Tunisia	1.53	1.63	NA	15.36	1.83	1.95	NA	18.40	1.82	1.94	NR	18.29
ASIA-PACIFIC												
Australia	2.00	2.05	62.32	40.45	1.72	1.77	57.63	35.97	1.81	1.85	60.69	38.43
Indonesia	1.33	1.52	35.19	31.99	1.73	2.16	32.94	28.39	1.76	2.19	28.98	28.98
Japan	2.38	2.55	63.60	35.86	2.44	2.60	64.26	35.11	2.70	2.85	70.88	41.07
Korea, South	NA	NA	NA	NA	NA	NA	NA	NA	3.32	4.47	NR	43.56
Pakistan	1.69	1.84	NA	18.30	1.73	1.88	NA	18.76	1.61	1.76	NR	15.02
Philippines	1.70	1.75	48.00	38.66	1.46	1.51	NA	NA	2.03	2.14	NR	NR
Singapore	2.12	2.42	45.75	NA	1.76	1.86	NA	46.28	1.83	2.03	49.68	26.18
Sri Lanka	NA	2.10	60.58	23.90	NA	2.10	60.58	23.90	NR	1.79	49.49	28.39
Thailand	1.77	1.92	46.21	24.73	1.82	2.07	48.21	27.52	1.88	2.21	49.22	30.35

NR—not reported; NA—not available.

Source: International Energy Annual 1983, Energy Information Administration, published November 1984; Gasoline and fuel oil prices are for the capitals of each city involved, except the U.S. which is the national average for the month given. All gasoline prices are pump retails and include taxes and custom duties.

International Prices of Diesel Fuel and Household Kerosine

(U.S. cents per gal.)

Country	Auto Diesel		Household Kerosine	
	1/1/84	7/1/83	1/1/84	7/1/83
Western Hemisphere				
Argentina	.66	.61	.73	.71
Bolivia	.45	.44	.11	.15
Brazil	1.41	NA	1.41	NA
Canada	1.38	1.42	1.35	1.35
Chile	1.42	1.45	1.48	1.49
Colombia	.84	.85	.75	.85
Dominican Republic	.96	.96	1.15	1.15
Ecuador	.35	.31	.22	.18
Jamaica	1.51	1.20	.76	.75
Mexico	.44	.36	.29	.21
Panama Republic	1.33	1 33	1.20	1.20
Paraguay	1.54	1.54	1.66	1.66
Peru	.66	.80	.40	49
United States	.96	.94	1.07	.89
Uruguay	1.54	1.16	1.55	1.18
Venezuela	.27	.27	.09	.09
Western Europe				
Austria	2.04	2.14	3.58	3.51
Belgium	1.71	1.76	1.11	1.11
Denmark	1.44	1.48	1.35	1.35
Finland	1.73	1.76	1.33	1.36
France	1.67	1.84	NA	NA
Germany, West	1.74	1.83	NA	NA
Greece	.90	1.09	1.02	1.23
Italy	1.41	1.43	1.45	1.51
Luxembourg	1.47	NA	1.12	NA
Netherlands	1.50	1.50	NA	1.40
Norway	1.35	NA	1.38	NA
Portugal	1.56	1.48	1.56	1.48
Spain	1.40	1.29	1.45	1.34
Sweden	1.21	1.24	1.29	1.26
Switzerland	NA	2.24	NA	NA
Turkey	1.15	1.24	1.18	1.19
United Kingdom	1.84	1.85	NA	NA
Yugoslavia	1.51	1.61	1.20	1.53
Middle East				
Israel	NA	1.63	NA	1.60
Saudi Arabia	.08	.15	.08	.15
Africa				
Ethiopia	1.44	1.44	1.20	1.20
Ghana	.67	.44	.56	.37
Kenya	NA	1.55	NA	1.11
Morocco	1.47	1.49	1.33	1.32
South Africa, Rep. of	2.60	NA	1.58	NA
Tunisia	NA	NA	.50	.61
Asia-Pacific				
Australia	1.54	1.37	1.54	1.38
Burma	NA	.27	NA	.27
Indonesia	.84	.78	.63	.54
Japan	1.72	1.58	1.27	1.34
Korea, South	NA	1.27	NA	1.44
Pakistan	1.13	1.16	.78	.79
Philippines	1.20	.95	1.20	.95
Singapore	1.02	1.07	1.15	1.17
Sri Lanka	1.26	1.26	1.02	1.02
Thailand	1.00	1.15	1.01	1.01

Source: International Energy Annual 1983 (see foot notes on preceeding page).

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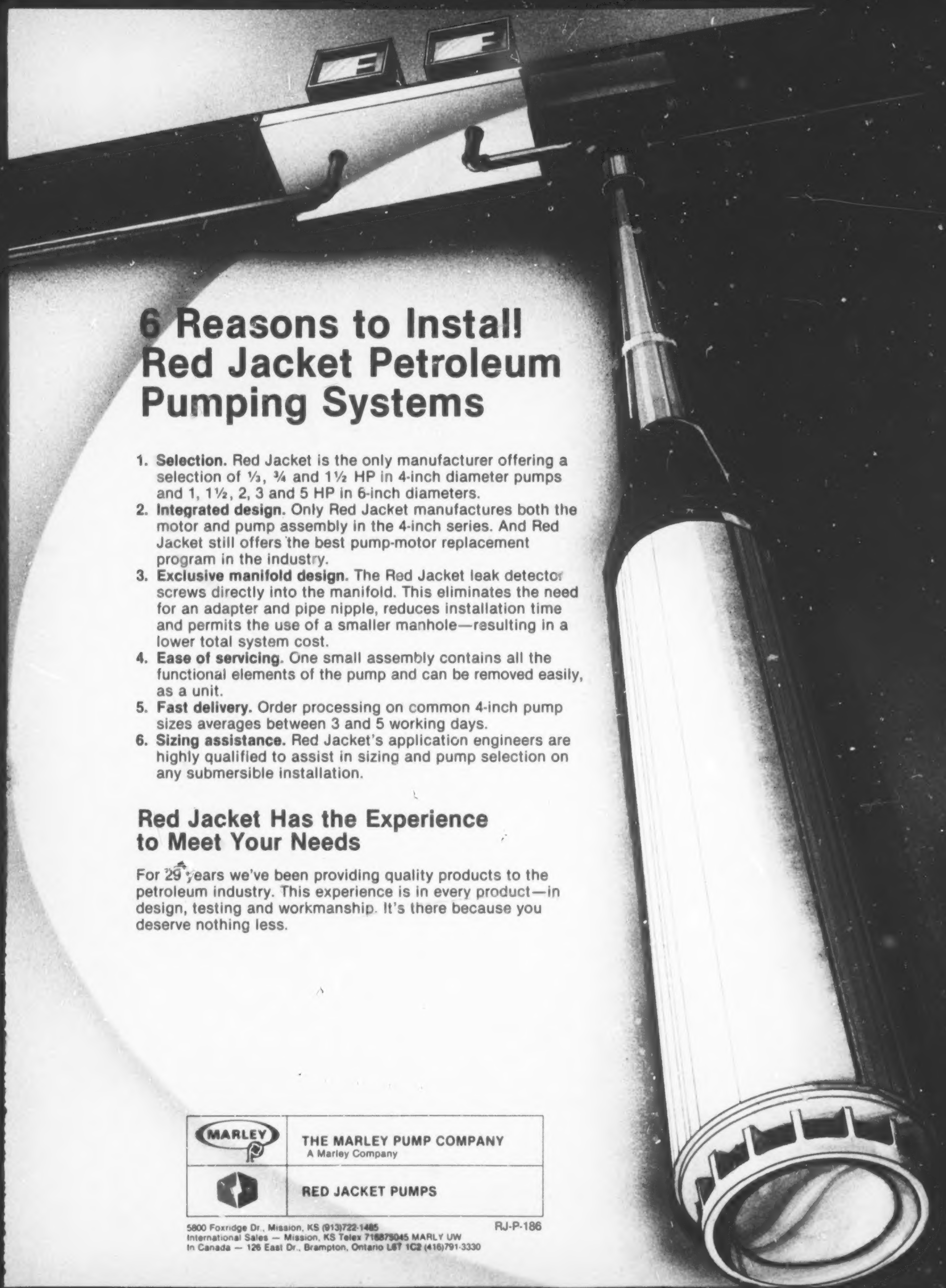

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Service Station Shakeout Slows Down

Has the precipitous decline in the service station population finally reached the bottoming out stage? It would appear that way, based on government and industry calculations and projections for 1984 and 1985 which include significant revisions of the forecasts that were made only a year ago.

The good news is contained in the 1983-1985 franchising report of the Bureau of Industrial Economics of the Department of Commerce.

The study says the 1984 population decline wasn't nearly as great as had been forecasted. It also says that the 1985 population decline will be the lowest one-year decrease since the big slide began way back in the hectic, oil-short days of 1973.

The 1984 population is estimated at 132,080 service stations. The 1985 projection is 130,000.

To put these figures in perspective, it should be noted that the early 1984 population forecast was 130,000 and that at least 6,500 retail outlets would vanish during the 12-month period.

Instead, the revised estimate for the 1984 population is 132,080 stations—meaning that only 4,500 stations had disappeared, 2,000 fewer than expected.

It also moved back by one full year the projection that the service station population would fall to around 130,000—that won't happen until year-end 1985.

The franchising study itself makes no projections on the possible bottoming out of the population slump. It sticks to its statistical knitting with drab tables and factual recitations. But industry observers were quick to note that the slowdown in the population decline may signal the end.

There's a building and rebuilding program going on now as majors and independents alike fight for diminishing market shares. Although some analysts had said in the past, while everything was going downhill at a breathtaking pace, that the service station population could possibly drop as low as 100,000, most observers felt that 125,000 to 130,000 was a more likely figure. And, that's where it appears to be heading in 1985.

About 2,100 stations are expected to be closed down in 1985. That's the lowest one-year total since 1976, when 2,640 were boarded up.

What this all means, however, is that the service station world has shrunk from 226,459 stations in 1972 to 132,080 in 1984, a drop of 94,379 or 41.7%. If the 1985 figure of 130,000 proves to be correct, the new total would be a drop of 96,459 stations and 42.6%.

That there are fewer stations does not mean the marketing industry is unable to handle the increased volume of passenger cars and other vehicular traffic. Many of the stations are being replaced by 100,000 to 200,000 gal./month pumpers and more than a few 300,000 gal./month stations.

Thus the years-long shakeout, while causing many casualties among independents, particularly "mom and pop" locations of 30,000 gal./month or so, is having a positive effect on the survivors.

This is borne out by the fact that gross income for the 130,000 service stations is expected to rise to $111-billion in 1985, up 4% over 1984's $107-billion.

The Bureau of Industrial Economics' figures, like those of the U.S. Census Bureau, only involve those service stations that generate 50% or more of their income from the sale of gasoline and oil products. So, it does not take retail pumps at convenience stores and other locations into consideration.

The Census Bureau definitions are so limited that they prompted the American Petroleum Institute to petition the government in November to broaden its base so that the marketing industry could get a better handle on its statistical profile.

Comparable U.S. Census Bureau Data (a)

	1982	1977	1972	% Chng. '82 v. '77	% Chng. '82 v. '72
No. of stations (b)	116,154	147,618	183,365	−21.3%	−19.5%
Total sales ($000,000)	$ 94,832	$ 53,749	$ 31,440	76.4	71.0
Average per station	$816,433	$364,108	$171,461	124.2	112.4
No. of employees	604,286	672,673	747,668	−10.2	−10.0

(a) Censuses are made every five years. Normally, the count includes stations with payrolls and those without payrolls, i.e., the 'moms and pops' and small family operations. In 1982, the Census Bureau overlooked the stations without payrolls, however, so the comparisons in this table are for stations with payrolls, which represented about 81% of the population in 1972 and 83% of the population in 1977.
(b) Stations are those which, by Census Bureau definition, generate 50% or more of their sales dollars from gasoline.
Source: U.S. Department of Commerce, Census of Retail Trade for 1982, 1977 and 1972. See related pages in this issue for 1982 breakouts and the 1980 *NPN Factbook* for 1977 details.

The Rise and Fall of U.S. Service Stations

	No. of Stations (a)			Sales ($000,000)		
Year	Total	Company-owned	Franchisee-owned	Total	Company-owned	Franchisee-owned
1985	130,000	23,400	106,600	$111,322	$20,038	$91,284
1984	132,020	23,774	108,306	107,040	19,267	87,773
1983	136,570	24,583	111,987	103,121	18,561	84,560
1982	144,690	26,044	118,646	106,544	19,178	87,366
1981	151,250	27,225	124,025	105,145	18,926	89,219
1980	158,540	30,122	128,418	96,338	18,304	78,034
1979	164,780	31,310	133,480	71,894	13,660	58,234
1978	172,300	32,737	139,563	60,884	12,177	48,707
1977	176,465	33,375	141,160	58,231	11,646	46,585
1976	186,840	37,368	149,472	53,416	10,683	42,733
1975	189,480	37,896	151,584	47,387	9,477	37,910
1974	196,130	39,226	156,904	43,829	8,766	35,063
1973	215,880	47,176	172,704	37,666	7,533	30,183
1972	226,459	44,200	176,259	33,656	6,812	26,844
1971	220,000	44,000	176,000	31,149	6,230	24,919
1970	222,000	44,400	177,600	29,340	5,868	23,472

(a) As defined by U.S. Censuc Bureau, stations with 50% or more of their income from sales petroleum products.
Source: "Franchising in the Economy, 1983-1985," U.S. Department of Commerce, January 1985.

The Outlook: 1985's Loss Only 1.6%

				Percent Change	
	1985	1984	1983	1985-84	1984-83
Number of establishments	130,000	132,080	136,570	(1.6)	(3.3)
Company-owned	23,400	23,774	24,653	(1.6)	(3.3)
Franchisee-owned	106,600	108,306	111,987	(1.6)	(3.3)
Total sales of products and services (Add 000,000)	$111,322	$107,040	$103,121	3.8	4.0
Company-owned	20,038	19,267	18,561	3.8	4.0
Franchisee-owned	91,284	87,773	84,560	3.8	4.0
Average per station	$856,322	$810,418	$755,079	5.7	7.3
No. of employees	NA	NA	530,700	—	—

(a) As of Dec. 31 of each year; (b) Service stations as defined by U.S. Census Bureau, i.e., stations with 50% or more of their income being derived from the sale of petroleum products.
Source: "Franchising in the Economy, 1983-85," U.S. Department of Commerce, January 1985.

Census Bureau Data: Service Stations with Payrolls

When it made its 1982 census of the retail trade, like it does every five years, the Census Bureau made one small mistake: incomplete data made it possible for the bureau to come up only with population totals on service stations *with payrolls*. Thus, the traditional "universe," which would include all of the "moms and pops" and one-man businesses, will not be available again until 1987. The data on this page is confined to stations with payrolls—which represent about 85% of the industry. The data, however, cannot be compared to the more complete census reports in earlier *NPN Factbook* editions. It must be borne in mind, too, that the Census Bureau counts only those stations which generate 50% or more of their sales dollars from gasoline and petroleum products. Not included in the totals are the outlets at convenience stores, mass merchandisers, garages and fleet stations, etc.

	Establishments with payrolls		Sales		Annual payroll		Paid employees
	1982	1977	1982 ($1,000)	% change 1977 to 1982	1982 ($1,000)	% change 1977 to 1982	1982
United States	116,154	147,618	$94,632,469	75.9	$4,769,073	24.4	604,286
Alabama	2,001	2,631	1,172,677	62.2	54,846	11.6	7,626
Alaska	176	167	205,901	109.6	15,680	45.4	1,220
Arizona	1,204	1,535	1,306,386	102.1	62,277	39.2	7,544
Arkansas	1,216	1,631	766,587	79.3	40,965	25.4	5,339
California	10,624	13,215	10,521,934	86.9	517,631	36.5	64,733
Colorado	1,570	2,119	1,429,634	110.1	70,850	31.9	9,404
Connecticut	1,726	2,017	1,446,166	82.6	84,330	39.6	9,957
Delaware	300	394	265,531	69.0	11,783	17.9	1,571
District of Columbia	158	242	180,038	30.9	10,124	− 15.5	1,137
Florida	5,504	6,363	4,778,926	107.4	243,650	54.4	29,419
Georgia	3,077	4,011	2,382,709	89.4	115,615	29.7	14,838
Hawaii	367	382	406,064	134.6	28,630	55.9	3,706
Idaho	494	661	362,934	69.4	16,753	25.3	2,408
Illinois	5,132	6,781	4,580,544	56.1	234,275	3.8	28,256
Indiana	3,167	4,143	2,726,474	66.7	129,531	10.4	16,302
Iowa	2,064	2,781	1,374,662	54.0	72,267	7.2	9,512
Kansas	1,511	2,033	1,067,526	70.1	57,614	21.5	7,118
Kentucky	2,119	2,753	1,553,143	61.7	74,706	11.6	9,688
Louisiana	1,972	2,417	1,534,832	89.2	77,925	37.5	10,479
Maine	640	767	385,236	65.3	20,894	29.2	2,909
Maryland	1,877	2,249	1,999,672	68.1	111,816	22.3	13,801
Massachusetts	2,962	3,468	2,318,222	85.2	116,424	27.3	16,662
Michigan	4,130	5,684	3,992,341	59.1	172,141	6.7	22,045
Minnesota	2,228	2,801	2,044,267	78.4	103,413	25.6	13,296
Mississippi	1,191	1,557	686,888	64.7	36,281	31.8	4,902
Missouri	2,944	4,041	2,229,484	57.6	117,632	10.9	14,608
Montana	528	752	399,439	60.4	22,171	17.6	2,923
Nebraska	1,129	1,426	743,218	49.0	39,232	1.8	5,206
Nevada	476	582	564,273	94.3	31,843	51.5	3,592
New Hampshire	547	637	399,472	70.3	20,215	25.8	2,692
New Jersey	4,157	4,597	3,154,818	83.5	162,251	32.2	20,117
New Mexico	780	1,067	645,949	88.4	32,993	26.7	4,248
New York	6,328	7,973	4,404,369	53.7	238,695	12.5	28,003
North Carolina	3,049	4,085	1,896,100	56.4	91,469	15.1	11,545
North Dakota	422	540	362,675	91.3	21,528	36.4	2,650
Ohio	5,904	7,800	5,303,649	75.5	236,688	8.3	30,714
Oklahoma	1,599	2,306	1,138,925	93.5	61,394	44.1	7,963
Oregon	1,492	1,852	1,107,522	78.0	58,710	30.9	7,598
Pennsylvania	5,761	7,253	4,275,721	58.3	208,024	14.5	29,618
Rhode Island	515	610	370,096	77.1	17,648	31.9	2,352
South Carolina	1,666	2,267	1,198,102	81.5	56,875	26.8	7,636
South Dakota	533	666	356,755	58.9	17,190	7.4	2,343
Tennessee	2,490	3,305	1,957,688	81.7	82,960	23.5	11,607
Texas	8,213	10,394	6,574,282	101.3	342,696	48.8	41,777
Utah	842	993	657,296	86.6	31,218	33.6	4,392
Vermont	359	455	217,379	64.1	12,339	35.5	1,731
Virginia	2,652	3,371	2,460,271	72.1	127,107	21.4	15,510
Washington	2,146	2,669	1,697,039	84.5	86,391	36.2	10,569
West Virginia	1,061	1,343	709,115	57.1	35,544	19.8	4,617
Wisconsin	2,701	3,304	2,109,613	77.3	103,871	27.1	13,929
Wyoming	430	538	398,618	95.4	22,842	49.0	2,475

Source: U.S. Census Bureau, 1982 Census of Retail Trade, Preliminary Report. Issued in October 1984.

Service Station Population by States— 1985 vs. 1982 (a)

The service station population totals on this page are projections by *NPN* based on more limited data than had been used in previous *Factbooks*. Because the U.S. Census Bureau was unable to provide a "universe picture" in 1982, as it had in 1977 and 1972, the 1982 totals are of stations with payrolls only—about 85% of the industry. Thus, these station totals cannot be compared with those published in prior *Factbook* editions, which included all the "moms and pops" and smaller stations which had no formal payroll operations.

	Total Gasoline Service Stations				Total Sales (add 000)			
	1985(a)	1984(a)	1983(a)	1982(b)	1985(a)	1984(a)	1983(a)	1982(b)
Alabama	1,797	1,827	1,889	2,001	1,253,269	1,207,388	1,160,950	1,172,677
Alaska	158	161	166	176	220,052	211,996	203,842	205,901
Arizona	1,081	1,099	1,137	1,204	1,396,180	1,345,067	1,293,334	1,306,396
Arkansas	1,092	1,110	1,148	1,216	819,271	789,278	758,921	766,587
California	9,543	9,698	10,029	10,624	11,245,052	10,833,383	10,416,715	10,521,934
Colorado	1,410	1,433	1,482	1,570	1,527,885	1,471,951	1,415,338	1,429,634
Connecticut	1,550	1,576	1,629	1,726	1,545,553	1,488,973	1,431,704	1,446,166
Delaware	269	274	283	300	283,780	273,391	262,876	265,531
D.C.	142	144	149	158	192,411	185,367	178,238	180,038
Florida	4,944	5,024	5,196	5,504	5,107,359	4,920,384	4,731,139	4,778,928
Georgia	2,764	2,809	2,905	3,077	2,546,460	2,453,237	2,358,882	2,382,709
Hawaii	330	335	346	367	433,971	418,083	402,003	406,064
Idaho	444	451	466	494	377,189	363,381	349,405	352,934
Illinois	4,610	4,685	4,845	5,132	4,906,028	4,726,424	4,544,639	4,590,544
Indiana	2,845	2,891	2,990	3,167	2,913,850	2,807,178	2,699,209	2,726,474
Iowa	1,854	1,884	1,948	2,064	1,469,135	1,415,352	1,360,915	1,374,662
Kansas	1,357	1,379	1,426	1,511	1,140,894	1,099,127	1,056,853	1,067,528
Kentucky	1,903	1,934	2,000	2,119	1,659,882	1,599,116	1,537,612	1,553,143
Louisiana	1,771	1,800	1,862	1,972	1,640,313	1,580,263	1,519,484	1,534,832
Maine	575	584	604	640	411,713	396,641	381,386	385,238
Maryland	1,686	1,713	1,772	1,877	2,137,099	2,058,862	1,979,675	1,999,672
Massachusetts	2,661	2,704	2,796	2,962	2,477,541	2,386,841	2,295,040	2,318,222
Michigan	3,710	3,770	3,899	4,130	4,266,714	4,110,514	3,952,418	3,992,341
Minnesota	2,001	2,034	2,103	2,228	2,184,759	2,104,777	2,023,824	2,044,267
Mississippi	1,070	1,087	1,124	1,191	734,094	707,220	680,019	686,888
Missouri	2,644	2,687	2,779	2,944	2,381,636	2,294,447	2,206,199	2,228,484
Montana	474	482	498	528	426,890	411,262	395,445	399,439
Nebraska	1,014	1,031	1,066	1,129	794,296	765,217	735,786	743,218
Nevada	428	435	449	476	603,053	580,975	558,630	564,273
New Hampshire	491	499	516	547	426,926	411,296	395,477	399,472
New Jersey	3,734	3,795	3,924	4,157	3,371,632	3,248,201	3,123,270	3,154,818
New Mexico	701	712	736	780	690,342	665,069	639,490	645,949
New York	5,684	5,777	5,974	6,328	4,707,080	4,534,759	4,360,345	4,404,389
North Carolina	2,739	2,783	2,878	3,049	2,026,409	1,952,225	1,877,139	1,896,100
North Dakota	379	385	398	422	387,600	373,410	359,048	362,675
Ohio	5,303	5,389	5,573	5,904	5,668,141	5,460,637	5,250,613	5,303,649
Oklahoma	1,436	1,460	1,509	1,599	1,217,197	1,172,637	1,127,536	1,138,925
Oregon	1,340	1,362	1,408	1,492	1,183,636	1,140,305	1,096,447	1,107,522
Pennsylvania	5,193	5,277	5,457	5,781	4,569,569	4,402,282	4,232,964	4,275,721
Rhode Island	463	470	486	515	395,531	381,051	366,395	370,096
South Carolina	1,496	1,521	1,573	1,666	1,280,441	1,233,566	1,186,121	1,198,102
South Dakota	479	487	503	533	381,273	367,315	353,187	356,755
Tennessee	2,237	2,273	2,351	2,490	2,092,230	2,015,636	1,938,111	1,957,688
Texas	7,377	7,497	7,753	8,213	7,026,098	6,768,881	6,508,539	6,574,282
Utah	756	769	795	842	702,469	676,752	650,723	657,296
Vermont	322	328	339	359	232,318	223,813	215,205	217,379
Virginia	2,382	2,421	2,503	2,652	2,629,353	2,533,095	2,435,668	2,460,271
Washington	1,928	1,959	2,026	2,146	1,813,668	1,747,271	1,680,069	1,697,039
West Virginia	953	969	1,002	1,061	757,849	730,105	702,024	709,115
Wisconsin	2,426	2,466	2,550	2,701	2,254,596	2,172,058	2,088,517	2,109,613
Wyoming	386	393	406	430	426,013	410,417	394,632	398,618
Total	**104,334**	**106,031**	**109,649**	**116,154**	**101,336,699**	**97,626,678**	**93,871,998**	**94,820,200**

(a) Projected by NPN on the basis of Census Bureau and other Commerce Department data. However, as noted above, this data is for stations with payrolls—not the "universe" which the *Factbook* published in prior years. These stations, by Census Bureau definition, are those which generate more than half of their sales dollars through the sale of gasoline and oil products.
(b) U.S. Census Bureau, Retail Trades Census, 1982, published in November 1984.
Source: See footnotes.

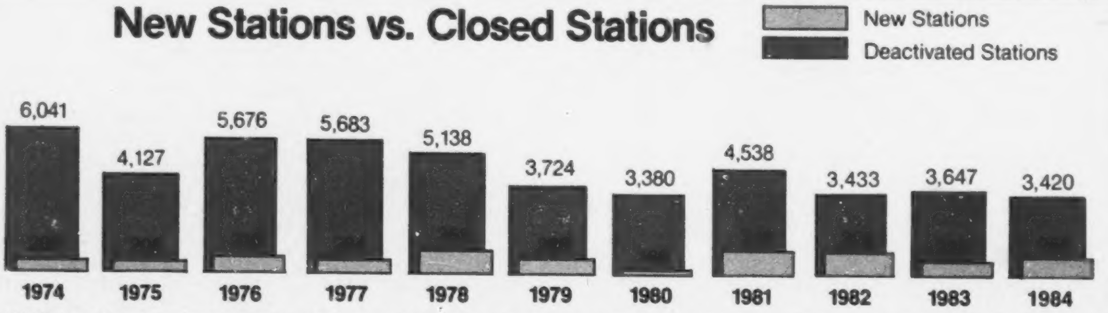
Service Station Deactivation Continues

In a significant revision of its 1983 data, the American Petroleum Institute says the deactivation of service stations in that 12-month period was much higher than originally thought.

API said the actual number of deactivated stations for 1983 was 3,647. It had originally reported the figure as 3,008, which would have been the lowest number of deactivations in a decade.

API said the number of deactivations in 1984 was 3,420, a drop of 227 stations from the corrected total for 1983.

API added two new categories to its 1985 service station report—modernization and rebuilding. It said 1,289 stations were modernized in the last two years—511 in 1983 and 778 in 1984. It also said 805 stations were rebuilt in that time—290 in 1983 and 515 in 1984. Modernization was described generally as face-lifting, while rebuilding was a ground-up make-over.



API definitions: A service station is defined as a retail outlet at which 50% of the dollar volume is from gasoline and related products; a newly constructed outlet is defined as one that has been erected completely on vacant land or is new on the site. This category does not include rebuilds. Permanently deactivated outlets are those where equipment and identification have been removed, and where re-opening as a service station is no longer contemplated.
Source: American Petroleum Institute, New Construction Report, May. 1984.

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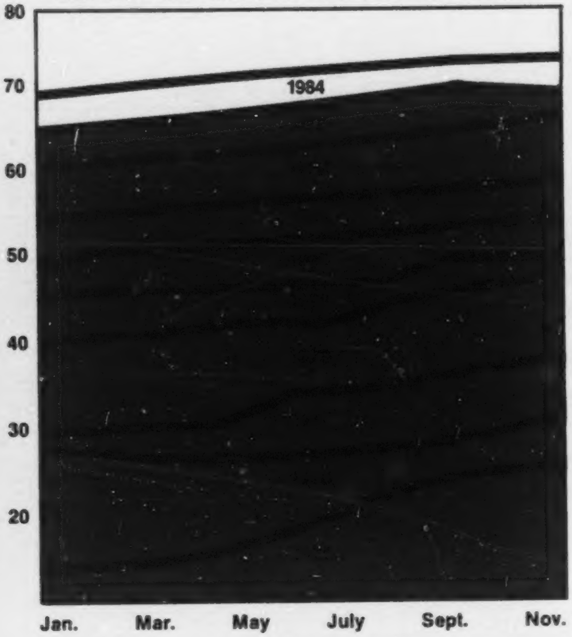
TEXACO

Self-Serve Hits 71%

In 1984, just as in every one of the last 10 years, self-service gained in popularity. It continues to be far and away the most popular way to market gasoline in the U.S.

An Amoco Oil Co. internal report [below] says self-service was preferred by 71% of motorists nationwide in 1984. Indeed, self-service popularity has never flagged since it passed the 50% mark in 1980. The Amoco figures come from a regular poll of its motorist/customers.

U.S. Self—Serve Motorist Gasoline Market Share (%)



State (a)	'84	'83	State (a)	'84	'83
Utah	88%	91%	Missouri	74%	73%
Arizona	87	86	Minnesota	73	71
Colorado	86	85	Ohio	73	70
South Carolina	86	83	Iowa	72	73
Texas	84	83	Arkansas	71	73
Washington	83	82	Mississippi	71	70
Wisconsin	83	81	Alabama	70	70
California	82	81	Washington, DC	70	73
Florida	82	80	South Dakota	70	65
New Mexico	82	86	Wyoming	70	69
Montana	81	77	Kansas	69	65
Nevada	81	81	North Dakota	69	62
North Carolina	81	80	Kentucky	68	65
Delaware	80	70	West Virginia	64	62
Illinois	80	77	Nebraska	61	65
Louisiana	80	76	Connecticut	60	57
Oklahoma	80	78	Rhode Island	55	48
Virginia	80	78	Pennsylvania	53	52
Idaho	79	79	New Hampshire	50	48
Georgia	78	79	New York	48	47
Indiana	78	76	Vermont	44	38
Maryland	76	73	Massachusetts	36	36
Tennessee	76	74	Maine	33	27
Michigan	75	74			

U.S. Average 1984—71%, 1983—70%

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IL residents add 7% Sales Tax

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☐ Charge $ ________ to my ☐ VISA ☐ MasterCard Account.

Card No. ________________ Exp. Date ________

Signature ____________________

Name ____________________

Address ____________________

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State ________________ Zip ________

Gasoline Shares by Key Categories—1984

This is a new study made public for the first time by MPSI Americas, Tulsa, Okla., which specializes in international computer software and information services as well as marketing research and planning.

It graphically portrays, on both a national and regional basis, market shares by orthodox service stations, by the big pumpers that focus their efforts on gasoline sales, by the convenience stores that also sell gasoline, and by the grab-bag category of "others," which includes car washes, garages and similar facilities.

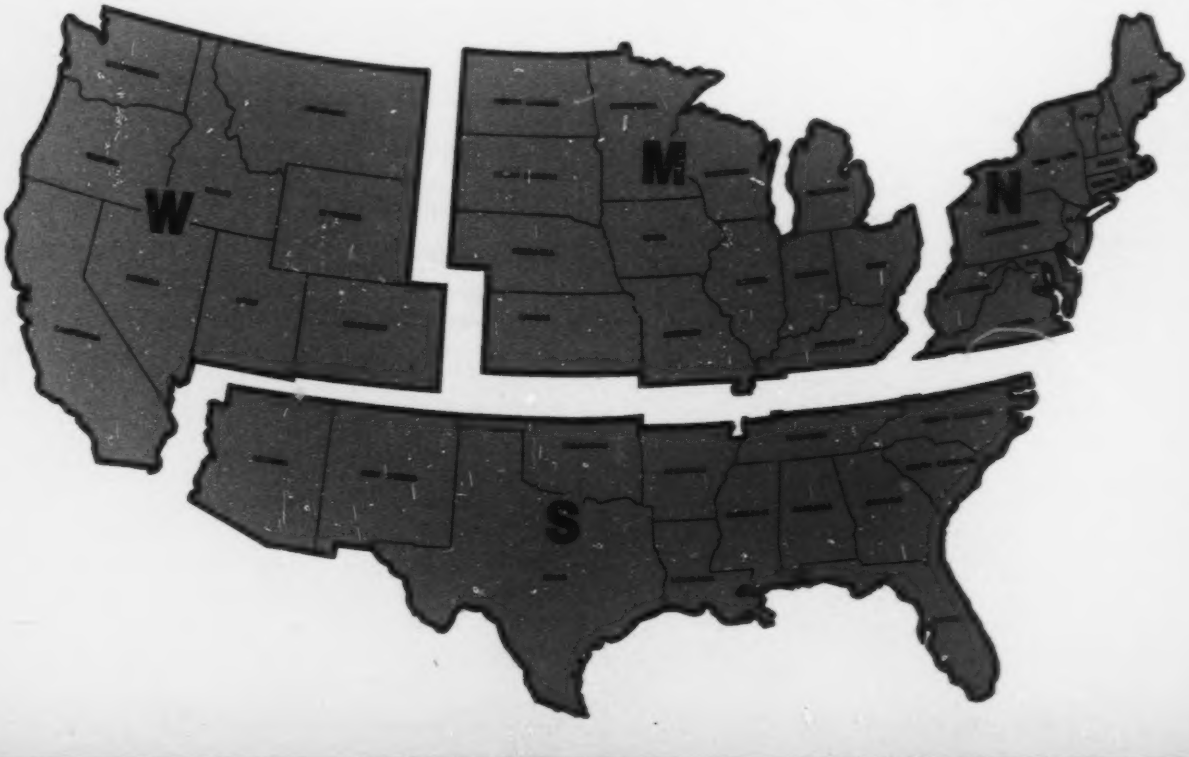
This study involves primarily the metropolitan areas of the country, where most of the gasoline is marketed. It makes no attempt to count the rural vendors and the highway units which, while important to the industry, do not add materially to the overall consumption statistics.

Of significance is the fact that the service stations in these metropolitan areas average a little more than 60,000 gal. monthly. This is substantially higher than the U.S. average for all service stations, which still runs around 40,000 gal. month. It also is interesting to note that pumpers in the selected metropolitan areas averaged 110,252 gal./month during 1984.

Regional and National Market Shares

	Service Stations	Pumpers	Convenience Food Stores	Others	Total
Northeastern Region					
• % of Outlets	62.4	24.2	2.6	10.8	100.0
• % of Volume	59.1	37.0	1.2	2.7	100.0
• Avg. Monthly Volume (Gallons)	73,931	119,412	35,159	19,798	78,126
Midwestern Region					
• % of Outlets	44.1	35.3	4.9	15.7	100.0
• % of Volume	35.6	55.9	3.1	5.4	100.0
• Avg. Monthly Volume (Gallons)	52,533	102,822	41,226	22,261	65,005
Sunbelt Region					
• % of Outlets	33.1	27.9	23.8	15.2	100.0
• % of Volume	31.4	51.7	11.7	5.2	100.0
• Avg. Monthly Volume (Gallons)	56,806	110,950	29,330	20,911	59,932
Western Region					
• % of Outlets	55.8	27.4	6.0	10.8	100.0
• % of Volume	47.5	46.2	2.6	3.7	100.0
• Avg. Monthly Volume (Gallons)	55,181	109,193	28,451	21,779	64,815
Total United States					
• % of Outlets	47.6	28.4	10.9	13.1	100.0
• % of Volume	43.6	47.2	5.0	4.2	100.0
• Avg. Monthly Volume (Gallons)	60,780	110,257	30,572	21,182	66.311

Source: MPSI Americas, Inc., Tulsa, Okla.



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For more information, contact your local Coca-Cola Bottler. Or call V. Ray Mo[illegible] Vice President National Sales, at (404) 676-2152

Business at Service Stations

Dollar Volume and Product Sales

					Gasoline		Motor oil	
Year	No. of service stations	Total sales (add 000,000,000)	Avg. per station (add 000)	Passenger cars (add 000)	Avg. gal.	Sales (000,000 gal.)	Qts. per year	Sales (add 000,000 qt.)
1985	130,000(a)	$111.3	$856.3	—	—	—	—	—
1984	132,080(a)	107.0	810.4	132,080	570	75,286	—	—
1983	136,570(a)	103.1	755.1	126,727	577	72,922	—	—
1982	144,690(a)	106.2	733.0	123,746	587	72,638	7.3	907
1981	151.250(a)	101.7	672.4	123,462	579	71,484	7.3	909
1980	158,540(a)	96.3	608.0	121,723	603	73,399	7.3	907
1979	164,790(a)	70.9	430.0	120,248	664	79,845	7.3	880
1978	172,300(a)	60.9	353.0	116,534	715	83,760	7.6	921
1977	176,465(b)	56.5	320.0	113,696	706	80,269	7.9	900
1976	186,400(a)	48.0	257.0	110,188	711	78,344	8.0	887
1975	189,460(a)	43.8	232.0	106,712	712	75,979	9.5	1,014
1972	226,459(a)	33.7	148.8	96,567	755	72,908	10.0	966

(a) Franchising in the Economy 1983-85. Department of Commerce; Bureau of Census definition of service stations: 50% or more of dollar volume comes from the sale of petroleum products.

Station Customers

		Privately owned passenger cars		Households owning cars		Licensed drivers		Women drivers	
Year	No. of service stations	Total (add 000)	Avg. per station	Total (add 000,000)	Avg. per station	Total (add 000,000)	Avg. per station	Total (add 000,000)	Avg. per station
1984	**132,080(a)**	**136,053**	**984.7**	**74.0**	**560.2**	**157.3**	**1,190.8**	**74.9**	**567.1**
1983	136,570(a)	126,727	927.9	73.0	534.5	154.2	1,129.1	73.4	537.5
1982	144,690(a)	123,746	855.8	72.0	497.6	150.3	1,038.8	71.7	491.9
1981	151,250(a)	123,462	816.3	70.0	460.5	147.0	969.0	69.2	457.5
1980	158,540(a)	121,723	767.8	67.2	423.8	145.3	916.7	68.1	429.5
1979	164,790(a)	120,248	731.1	65.9	400.0	143.3	868.3	66.8	403.5
1978	172,300(a)	116,534	676.3	64.6	375.0	140.8	817.1	65.3	379.0
1977	176,465(a)	113,696	644.3	63.3	365.5	138.4	784.4	63.7	361.0
1976	186,400(a)	110,188	591.1	62.0	332.6	130.3	689.4	57.9	306.3
1975	189,480(a)	106,712	563.2	60.5	319.3	127.8	662.2	56.8	294.3
1972	226,459(b)	96,567	426.4	52.8	232.2	118.4	522.8	52.6	232.3

(a) Franchising in the Economy 1983-85, Department of Commerce.
(b) Bureau of Census definition of service stations: 50% or more of dollar volume comes from the sale of petroleum products.
Source: Based on data from Motor Vehicle Mfgs. Assn., Federal Highway Administration, and NPN.

How Stations Rank in Sales (Billions of Dollars)

	1984	% Change '84-'83	1983	% Change '83-'82	1982	% Change '82-'81	1981	% Change '81-'80
All Retail Stores	1,295.8	10.4%	1,174.0	9.2%	1,074.6	3.4%	1,038.8	9.1%
Food Group	275.3	6.1	259.4	4.1	249.3	4.9	237.6	9.6
Automotive Group	264.2	19.2	221.7	21.4	182.6	1.1	180.7	11.3
General Merchandise	157.4	10.8	142.0	7.1	132.6	4.0	127.5	9.1
Eating and Drinking Places	125.5	8.5	115.7	10.5	104.7	11.3	94.1	9.7
Gasoline Service Stations	**105.0**	**1.8**	**103.1**	**(0.4)**	**103.5**	**1.8**	**101.7**	**8.7**
Apparel Group	59.4	10.0	54.0	5.1	51.4	7.5	47.8	7.7

Source: Survey of Current Business, Department of Commerce, Vol. 65, No. 1, January 1985.

Personal Consumption Expenditures

	(Billions of Dollars)					Seasonally Adjusted at Annual Rate—1984			
	1984	% Change '84-'83	1983	% Change '83-'82	1982	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.
Total Expenditures	$2,342.3	8.6%	$2,155.9	8.2%	$1,991.9	$2,276.5	$2,332.7	$2,361.4	$2,398.6
Durable Goods	318.4	13.8	279.8	14.4	244.5	310.9	320.7	317.2	324.7
Automobiles	149.5	15.6	129.3	17.7	109.9	147.7	152.3	148.6	149.4
Furniture	117.1	12.5	104.1	11.4	93.5	113.0	116.6	116.8	122.0
Other Durable	51.8	11.6	46.4	12.9	41.1	50.3	51.7	51.9	53.3
Nondurable Goods	858.3	7.1	801.7	5.3	761.0	841.3	858.3	861.4	872.1
Food	444.3	6.7	416.5	12.6	369.9	433.9	442.1	448.6	452.6
Clothing and Dress	140.3	10.5	127.0	6.7	119.0	136.1	142.2	139.3	143.7
Gasoline and Oil	**91.7**	**1.9**	**90.0**	**(1.6)**	**91.5**	**92.0**	**92.8**	**90.0**	**92.0**
Other Nondurable Goods	182.0	8.2	168.2	9.6	153.5	179.3	181.2	183.6	183.8
Fuel Oil and Coal	21.3	1.4	21.0	5.0	20.0	22.5	21.6	21.1	19.8
Other Nondurable	160.7	9.2	147.2	10.3	133.5	156.7	159.7	162.5	163.9
Services	1,165.7	8.5	1,074.4	8.9	986.4	1,124.4	1,153.7	1,182.8	1,201.8

Source: Survey of Current Business, Department of Commerce,. Vol. 65, No. 1, January 1985.

How 1984 Mergers Changed Retail Rankings

With 1984's oil mergers came significant changes in ranking and station numbers for three of the top 21 companies.

For the other 18, 1984 was marked only by the now-usual number of pullouts, consolidations, and station closings.

Texaco jumped to the top of the heap in '84 with a net gain of 868 outlets, including those from the Getty Oil purchase and new Texaco 2000 units, and added three states to its marketing string. In the fall, however, the company will pull out of branded marketing in Indiana, Kentucky, Wisconsin, and most of Illinois.

Chevron was busy in late 1984 solidifying its merger with Gulf, and actually ended the year with one less state and nearly 1,500 fewer outlets than it had in '83. But now that it officially has added the 7,922 Gulf properties it retained, it will come out a winner, moving from No. 6 to No. 2 with 18,540 stations in 42 states. It remains to be seen if Chevron will leapfrog to No. 1 when Texaco sheds those Midwest outlets.

The biggest winner of all was Sohio. The Southeast properties it picked up in the FTC-mandated Chevron/Gulf merger scramble helped it add the major part of 6,460 units for a total of 8,560 branded retail outlets. When the year ended, Sohio was sitting at No. 9, up from No. 15 on the list.

As a sidelight, unranked Power Test became the nation's largest independent marketer in early January when it took control of the Northeast Getty assets from Texaco. At the end of 1983, the company reported 475 outlets in five states. The company now reports approximately 2,300 gasoline stations in a 12-state area—a total that would put it at No. 15 in the rankings.

		Outlets	*'83*
1	**Texaco**	19,558	(2)
2	**Exxon**	18,139	(1)
3	**Amoco**	15,652	(3)
4	**Mobil**	13,862	(4)
5	**Shell**	11,010	(5)
6	**Chevron**	10,618	(6)
7	**Union**	10,365	(8)
8	**Phillips**	9,705	(7)
9	**Sohio**	8,560	(15)
10	**Sunoco**	6,425	(9)
11	**Conoco**	4,800	(10)
12	**Fina**	4,385	(12)
13	**Arco**	3,884	(11)
14	**Citgo**	3,599	(13)
15	**Marathon**	2,299	(14)
16	**Diamond Shamrock**	2,060	(17)
17	**Ashland**	1,910	(16)
18	**Kerr-McGee**	1,839	(18)
19	**Murphy**	591	(19)
20	**Tenneco**	423	(20)
21	**Crown Central**	188	(21)

	Number of states*		**Branded retail outlets**	
	'84	**'83**	**'84**	**'83**
Amoco	36	35	15,652	17,800
Arco	22	24	3,884	4,363
Chevron	38(a)	39	10,618(a)	12,111
Exxon	38	41	18,139	18,707
Mobil	41	43	13,862	15,403
Shell	38	40	11,010	12,147
Texaco	46	43	19,558	18,690
Ashland	15	15	1,910	2,071(b)
Citgo	31	31	3,599	3,915
Conoco	34	40	4,800(d)	5,091
Crown Central	7(c)	8	188(c)	200(d)
Diamond Shamrock	24	25	2,060	1,993
Fina	22	20	4,385	4,037
Kerr-McGee	22	21	1,839	1,785
Marathon	6	5	2,299	2,210
Murphy	14	14	591	614
Phillips	34	37	9,705	11,827
Sohio	30	20	8,560	2,100
Sunoco	29	27	6,425	6,808
Tenneco	15	15	423	418
Union	42	44	10,365	11,221

Source: *NPN* questionnaires

*Includes District of Columbia.

(a) Excludes Gulf stations acquired in early 1985. The 7,922 Gulf stations give Chevron 18,540 outlets in 42 states.

(b) Old 1983 count of 187 outlets was for Ashland-branded company-ops only—new counts include all of Ashland's branded outlets, plus SuperAmerica and other direct-operated brands.

(c) After May 1 station swap with Mobil, total is 185 stations in six states.

(d) Approximately.

C-Store Growth Continues Skyward

Six out of 10 convenience stores now are selling gasoline, and the number is expected to increase as U.S. population expands, according to John Roscoe, a West Coast C-store chain operator himself and the author of the annual "Dollars Per Day Survey of the Small Food Industry."

In his 1985 summary, which is an analysis of the top 11 publicly owned chains extrapolated to represent the industry as a whole, Roscoe said the surveyed group had 13,883 stores in 1983, of which 53.4% sold gasoline. He said this group alone accounted for 2.9-billion gal. of gasoline in 1983, which was 2.9% of what he estimates to be a 99.4-billion-gal. national market.

Going a step further, and looking at both 1984 and 1985, Roscoe said:

"Our best estimate of the amount of gasoline sold through all C-type stores, which includes traditional convenience stores, plus other food and gasoline combinations, for 1983 is 14.2-billion gal. or 14.7% of the highway gasoline sold in the United States.

"We estimate that there are about 53,000 convenience-type stores in the United States and that 63% of them now sell gasoline. On the average, they sell 1,201 gal./day per store. Over 20% of the gasoline sold in the United States will be sold through this type of outlet in 1985. In 1976, only 1% of the total gasoline sold in the United States was sold through convenience stores."

Roscoe's summary noted that he was probably the first to sell gasoline through a remote-controlled, self-service pump in 1964, thus establishing a beachhead for gasoline operations in the food-store industry.

One C-store chain, Southland (7-Eleven), marketed almost 1.4-billion gal. of gasoline in 1983. The chain, even though primarily a grocery store operation, had been regarded as the nation's leading independent gasoline marketer until it purchased Citgo Oil Co.'s facilities in 1983 and also acquired a refinery, which changed its status to a refiner-marketer in the perspective of traditional oil marketing. (Power Test Corp., which in early 1985 acquired Getty Oil's eastern marketing facilities from Texaco, is now considered the nation's leading independent gasoline marketer.)

Southland has 7,300 stores all told—more than triple the number of its nearest competitor, Circle K. But only 41% of Southland's stores sell gasoline while 67% of Circle K's do. Casey's, a chain of 427 stores, sells gasoline at all of them for a 100% performance. Sunshine Jr. sells gasoline at nine out of 10 of its 345 stores. Others conform in varying percentages ranging from 16% to 70%.

The federal government also takes a look at the C-store field, but limits itself to the franchised businesses, thus the totals are much smaller. The growth record parallels Roscoe's findings, however. The government data indicates that the franchised convenience store population will be around 16,000 by the end of this year. This will be a growth of 4.4% in 1985 on top of a growth of 4.4% in 1984 (See Franchise Projections table at right).

More interesting, however, is the government's projection that these franchised stores will handle $12.3-billion in sales and services in 1985, up 10% over 1984 which, at $11.2-billion, was likewise up 10.1% over 1983. In other words, not only are the numbers increasing but the sales volumes as well.

Roscoe, in his annual pre-tax dollars-per-day ranking of the most profitable companies, gave the nod to Shop & Go., Mango, Fla., for the fourth consecutive year. The others in descending order were National Convenience Stores, Houston, Texas; Circle K, El Paso, Texas; Lil' Champ, Jacksonville, Fla.; Southland Corp. (7-Eleven), Dallas, Texas; Little General, Tampa, Fla.; Dairy Mart Convenience Stores, Enfield, Conn.; Casey's General Stores, Des Moines, Iowa; Sunshine Jr. Stores, Panama City, Fla.; Munford Inc., Atlanta, Ga.; and Conna Corp., Louisville, Ky.

Dollars Per Day Survey

Company	# of Gasoline Units	Gal. Sold in 1983 (Add 000)	Avg. Gal. Sold per Day per Unit	Gasoline Margin per Gal.	% of Sales Contributed by Gasoline
Shop & Go	307	106,000	982	3.2¢	36.9%
Nat'l Convenience	775	310,000	1,152	6.7¢	39.7
Southland	3,007	1,361,200	1,279	N/A	25.5
Circle K	1,463	346,000	915	6.8¢	37.1
Lil' Champ	101	24,943	745	4.1¢	31.1
Little General	212	44,794	586	N/A	22.6
Casey's	427	145,129	1,294	7.8¢	53.4
Sunshine Jr.	321	68,647	586	N/A	52.0
Munford	469	373,000	2,185	N/A	N/A
Dairy Mart	28	12,397	1,332	N/A	N/A
CONNA	268	134,000	1,374	N/A	36.8
Totals	**7,378**	**2,926,108**	**1,201**	**N/A**	**N/A**

Source: John F. Roscoe, 14th Annual Dollars-Per-Day Survey—1985.

Ten-Year Box Score on Growth

Survey Year	No. of Stores	Net Growth	No. with Gasoline Units	Gasoline Units Added in Year	% of Stores with Gasoline Units
1984 (a)	13,883	1,607	7,378	990	53.14%
1983 (a)	12,276	—	6,029	480	49.11
1982	12,400	107	5,739	393	46.76
1981	12,445	205	5,533	442	44.45
1980	13,167	247	5,630	447	42.76
1979	12,920	313	5,153	569	39.88
1978	12,597	644	4,584	792	36.38
1977	11,953	360	2,792	959	31.72
1976	11,356	672	2,786	557	24.53
1975	10,143	928	2,147	194	21.16

(a) Ten chains in this survey versus 11 chains in previous studies.
Source: 14th annual Dollars-Per-Day Survey, John F. Roscoe, March 1985.

Government Franchise Projections

	1985	1984	1983	Percent Changes '83-'84	Percent Changes '84-'85
Total number of establishments:	15,998	15,331	14,683	4.4%	4.4%
Company-owned	9,109	8,795	8,446	3.6	4.1
Franchisee-owned	6,889	6,536	6,237	5.4	4.8
Total sales of products and services: ($000)	$12,308,939	$11,189,394	$10,148,118	10.0	10.3
Company-owned	7,819,214	7,080,234	6,388,603	10.4	10.8
Franchisee-owned	4,489,725	4,109,160	3,759,515	9.3	9.3

Distribution by Establishments—1983

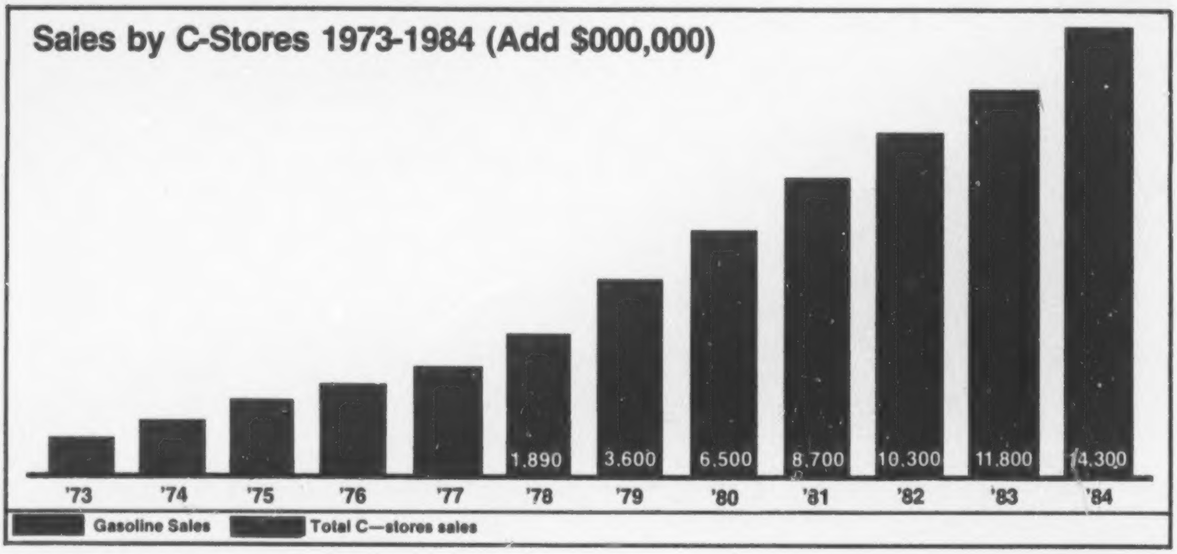
Size Groups	Franchising Companies Number	Establishments Number	Establishments %	Sales ($000)	Sales %
1001 and Greater	4	10,301	70.2	$ 8,178,537	80.6
501 - 1000 151 - 500	9	3,805	25.9	1,711,120	16.9
51 - 150	6	402	2.7	183,916	1.8
11 - 50 0 - 10	9	175	1.2	74,545	0.7
Total	**28**	**14,683**	**100.0**	**10,148,118**	**100.0**

Source: "Franchising in The Economy, 1983-85," U.S. Department of Commerce, January 1985.

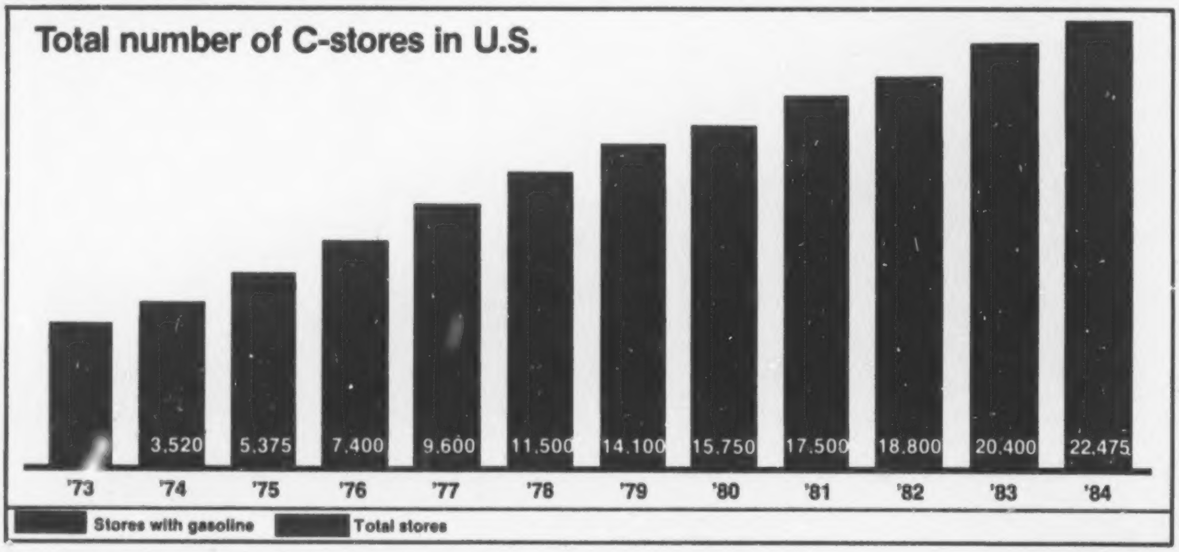
Convenience Store Population—1983

	Population (000)	Households (000)	Supermarkets	C-stores	Convenience store sales (000,000)		Households per C-store
					In-store	Gasoline	
New England	**12,605**	**4,658**	**1,435**	**1,902**	**$756**	**$450**	**2,449**
Maine	1,157	425	142	155	67	55	2,742
New Hampshire	968	356	143	129	56	37	2,759
Vermont	528	193	82	49	17	15	3,930
Massachusetts	5,820	2,157	568	971	415	157	2,221
Rhode Island	962	360	89	156	48	42	2,306
Connecticut	3,170	1,167	411	442	153	144	2,640
Middle Atlantic	**37,104**	**13,821**	**3,864**	**3,792**	**1,877**	**857**	**3,645**
New York	17,678	6,671	1,911	1,044	520	355	6,389
New Jersey	7,465	2,701	678	1,150	646	60	2,349
Pennsylvania	11,981	4,449	1,375	1,598	711	442	2,784
East North Central	**42,020**	**15,451**	**5,124**	**5,059**	**2,095**	**1,064**	**3,054**
Ohio	10,825	4,019	1,362	2,056	885	300	1,955
Indiana	5,518	2,026	762	636	212	172	3.185
Illinois	11,574	4,287	1,210	857	423	187	5,002
Michigan	9,289	3,351	1,061	950	418	259	3,528
Wisconsin	4,814	1,768	729	560	157	146	3,157
West North Central	**17,447**	**6,590**	**2,310**	**2,786**	**1,020**	**837**	**2,365**
Minnesota	4,137	1,533	498	749	271	170	2,047
Iowa	2,921	1,104	371	578	134	175	1,911
Missouri	5,005	1,911	676	636	302	195	3,003
North Dakota	669	244	84	83	23	12	2,941
South Dakota	694	255	90	99	43	29	2,571
Nebraska	1,598	608	220	203	63	87	2,997
Kansas	2,423	935	371	438	184	169	2,135
South Atlantic	**39,189**	**14,598**	**5,310**	**9,998**	**3,269**	**3,613**	**1,460**
Delaware	606	221	70	110	45	30	2,006
Maryland	4,341	1,572	474	605	330	126	2,599
District of Columbia	626	259	42	108	51	20	2,402
Virginia	5,591	2,027	736	1,203	544	236	1,685
West Virginia	1,984	730	283	325	126	115	2,247
North Carolina	6,102	2,218	1,038	1,530	382	534	1,450
South Carolina	3,263	1,127	520	900	294	513	1,252
Georgia	5,758	2,062	787	1,513	409	993	1,363
Florida	10,918	4,382	1,360	3,704	1,088	1,046	1,183
East South Central	**14,973**	**5,386**	**2,158**	**3,356**	**1,149**	**1,322**	**1,605**
Kentucky	3,714	1,340	538	739	346	344	1,813
Tennessee	4,692	1,723	667	1,105	406	448	1,560
Alabama	3,993	1,439	561	870	216	297	1,655
Mississippi	2,574	884	392	642	181	233	1,377
West South Central	**25,554**	**9,314**	**3,390**	**7,257**	**3,185**	**2,237**	**1,284**
Arkansas	2,347	877	342	450	126	140	1,949
Louisiana	4,452	1,562	560	900	319	288	1,736
Oklahoma	3,222	1,246	474	1,265	411	578	985
Texas	15,533	5,629	2,014	4,642	2,329	1,231	1,213
Mountain	**12,286**	**4,499**	**1,665**	**2,676**	**1,231**	**691**	**1,681**
Montana	808	305	132	182	66	43	1,675
Idaho	986	355	185	165	85	40	2,150
Wyoming	524	193	65	119	39	32	1,621
Colorado	3,093	1,187	334	647	291	189	1,835
New Mexico	1,371	486	186	364	159	100	1,335
Arizona	2,952	1,089	408	749	385	178	1,454
Utah	1,610	517	209	256	109	71	2,019
Nevada	922	367	126	194	97	38	1,892
Pacific	**33,602**	**12,809**	**4,294**	**3,574**	**1,918**	**729**	**3,584**
Washington	4,378	1,708	702	558	291	136	3,060
Oregon	2,710	1,067	460	437	209	61	2,441
California	25,072	9,565	2,943	2,430	1,354	507	3,936
Hawaii	1,011	322	119	72	30	11	4,479
Alaska	431	147	70	77	34	14	1,916
Total	**234,760**	**87,126**	**29,550**	**40,400**	**$16,500**	**$11,800**	**2,157**

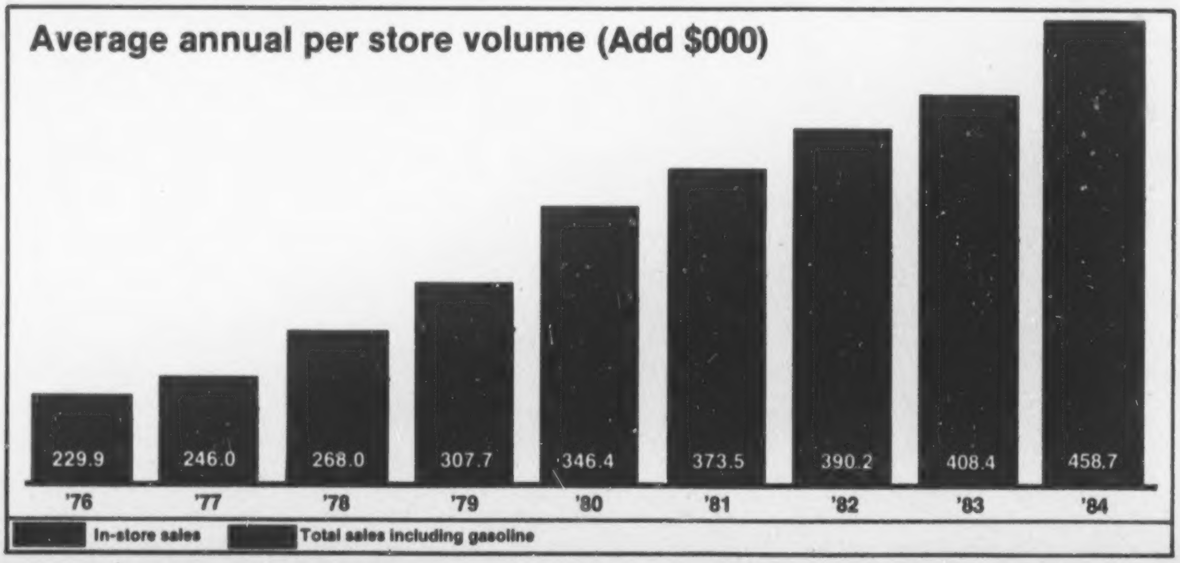
Source: C-Store Business, Research & Data Center, October 1984.



Sales by C-Stores 1973-1984 (Add $000,000)

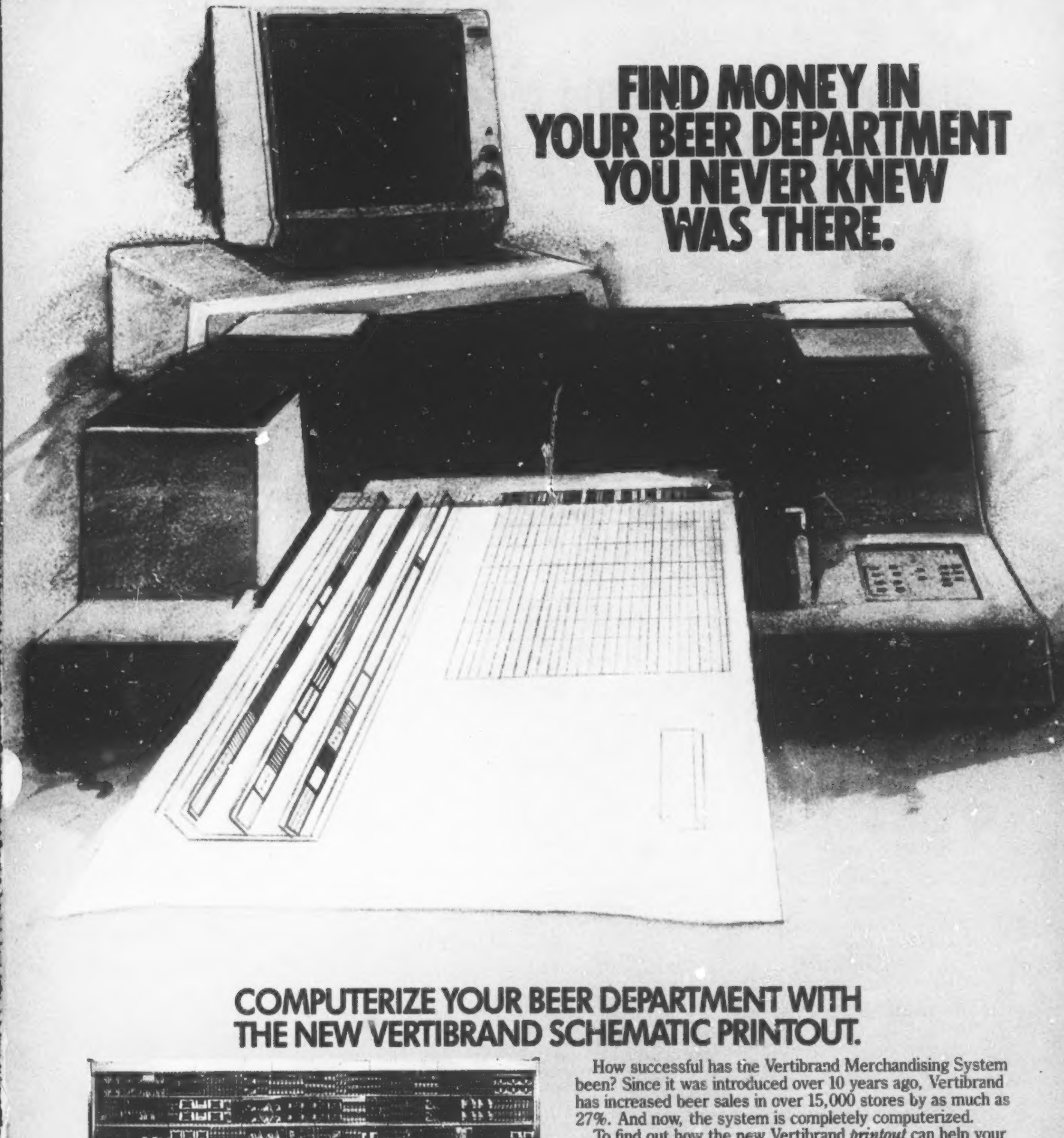


Total number of C-stores in U.S.

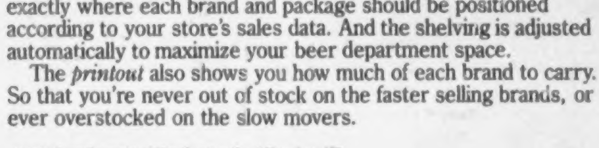


Average annual per store volume (Add $000)

FIND MONEY IN YOUR BEER DEPARTMENT YOU NEVER KNEW WAS THERE.



COMPUTERIZE YOUR BEER DEPARTMENT WITH THE NEW VERTIBRAND SCHEMATIC PRINTOUT.



Now you can increase your beer department profits with the help of our new, one-page *printout*, custom-designed for your store.

The *printout* gives you a color-keyed schematic showing you exactly where each brand and package should be positioned according to your store's sales data. And the shelving is adjusted automatically to maximize your beer department space.

The *printout* also shows you how much of each brand to carry. So that you're never out of stock on the faster selling brands, or ever overstocked on the slow movers.

How successful has the Vertibrand Merchandising System been? Since it was introduced over 10 years ago, Vertibrand has increased beer sales in over 15,000 stores by as much as 27%. And now, the system is completely computerized.

To find out how the new Vertibrand *printout* can help your sales, write to Charles A. Whipple, V.P./National Retail Sales, Miller Brewing Company, 3939 West Highland Blvd., Milwaukee, WI 53201. It's absolutely free.

So discover money in your beer department you never knew was there.

MILLER BREWING COMPANY
THE LEADER IN
BEER MERCHANDISING

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Chevron, Texaco '84 Market Share Champs

Chevron and Texaco surged to the front of the pack to become the nation's leading gasoline marketers in 1984, bolstered by the megabuck acquisitions they made earlier in the year.

Chevron purchased Gulf Oil for $13.2-billion and Texaco bought Getty Oil for $10.2-billion in two of the great upheavals that shook the oil industry from top to bottom.

They shouldered aside Exxon, Amoco and Shell—the traditional leaders of the gasoline derby in recent years—by head-swimming margins. Chevron had a 69.7% increase in volume in 1984, Texaco 34.2%.

For Chevron, it was a spellbinding affair. It shot up from seventh place in 1983 to first in 1984 with a gross gasoline gallonage of 9.6-billion gal. Without the Gulf gallonage, it probably would have been way down in the pack again in 1984. For the record, however, the 9.6-billion gal. it vended last year represents an all-time high for any gasoline marketer in the U.S.

Texaco, which used to be the perennial leader but has been No. 4 or No. 5 in recent years, finished up with 8.7-billion gal.—about 1-billion gal. behind Chevron. Getty's string of stations added about 2-billion gal. to Texaco's 1984 total or else it too would have been somewhere around its usual position on down the line.

For both of the companies, however, the 1984 glories apparently will be one-shot affairs. Chevron already has spun off Gulf's southeastern properties in keeping with its agreement with the Federal Trade Commission. So, this gallonage and probably some other Gulf gasoline volumes will not be available for the California company's 1985 totals. The same holds true for Texaco which, under FTC mandate, spun off Getty's marketing facilities on the East Coast and the Midwest-Mid-continent areas. The Texaco gallonage in 1985 should be much lower than 1984.

A surprising aspect of this share-of-market analysis developed by *National Petroleum News* is that it puts Exxon in a different perspective and ranks the company where most people have always thought it should be—consistently on top, or very close to it. Exxon was third in 1984 but only because the Chevron/Gulf and Texaco/Getty combinations were too much to overcome. It was No. 1, however, in 1983, 1982, 1981 and 1980. The probability is that it will regain its leadership at the end of this year.

The thing that bothered many people was how Exxon could be the industry's statistical goliath in so many directions and dimensions yet be ranked so poorly in gasoline sales. It would appear then that not all of Exxon's gasoline sales were being recognized and measured so that its totals dropped behind several others, notably Amoco and Shell.

Amoco and Shell, because of the Chevron/Texaco skyrocketing, wound up fourth and fifth in 1984 gasoline volumes. A five-year overview shows, however, that Amoco consistently has been right behind Exxon in recent years, and Shell a close third.

NPN's share-of-market data is collected from the annual reports of the top oil companies. They are gross gallons—for both on-highway and off-highway use. But since off-highway consumption of gasoline averages only 3.2% to 3.3% of the gross total, it really isn't enough to have a major impact on the volumes and the standings.

The gross volumes are what the companies told their shareholders and the federal authorities in Washington were the amounts of gasoline they sold in 1984. They are bottom-line figures which accurately assess a given company's position and rank in the marketplace in gasoline sales.

To obtain the total gasoline sales for the entire industry, *NPN* used Federal Highway Administration data, which is based on the tax-paid gasoline sales reports pre-

Gasoline Consumption: On- Vs. Off-Highway use

(billions of gal.)

Year	Highway Use	Off-Highway Use	Total Use	% Chng. Annually	% Off-Highway Use
1984 (a)	103.8	3.4	107.2	4.5%	3.2%
1983	99.4	3.2	102.6	.8	3.1
1982	98.5	3.3	101.8	(1.3)	3.2
1981	99.6	3.5	103.1	(1.6)	3.4
1980	101.2	3.6	104.8	(6.3)	3.4
1979	108.1	3.7	111.8	(3.5)	3.3
1978 (b)	112.2	3.6	115.8	—	3.1

(a) Estimated by *NPN* on basis of Federal Highway Administration data.

(b) Peak year of consumption.

Source: Federal Highway Administration, "Highway Statistics Annual." The totals in this table may vary slightly from other basic FHA tables because of some exclusions and additions.

The Gasoline Market: By Gross Gallonage and Relative Shares

	1984 (Total Sales Equal 107,219,431,000 gal.)				1983 (Total Sales Equal 104,231,431,000 gal.)			
Company	Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '84 vs. '83	Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '83 vs. '82
Chevron (a)	1	8.979%	9,627,240	69.7%	7	5.442%	5,672,100	4.5%
Texaco (b)	2	8.078	8,661,450	34.2	4	6.191	6,453,930	8.5
Exxon	3	7.292	7,818,300	.99	1	7.427	7,741,650	4.8
Amoco	4	6.877	7,373,730	2.5	2	6.897	7,189,770	(1.7)
Shell	5	6.820	7,312,420	2.6	3	6.839	7,128,450	1.3
Arco	6	5.733	6,147,330	8.7	8	5.427	5,656,770	13.9
Mobil	7	5.519	5,917,380	—	5	5.677	5,917,300	2.1
Sun	8	3.846	4,123,770	2.3	10	3.868	4,031,790	(4.4)
Sohio	9	3.675	3,939,810	(3.7)	9	3.926	4,093,110	9.4
Union	10	3.311	3,550,428	2.1	12	3.336	3,476,844	6.9
Phillips	11	3.117	3,341,940	2.8	11	3.118	3,249,960	(1.9)
Gulf (c)	—	—	—	—	6	5.574	5,810,070	(4.8)
Total		63.25 %	67,813,798	(N.C.)		63.73 %	66,424,840	3.1%

(a) Chevron acquired Gulf in early 1984, thus Chevron's gallonage for 1984 includes 10 months of Gulf gallonage.

(b) Texaco acquired Getty in early 1984, thus Texaco's gallonage for 1984 includes Getty's gallonage for 1984; Getty had volumes of 1.9-billion gal. in 1983; 1.9-billion in 1982; 1.9-billion in 1981 and 2.0-billion in 1980. Getty's gallonage in 1980-83 averaged 1.8% of the national market share.

(c) Gulf was acquired by Chevron in early 1984 and its 1984 gallonage is included in Chevron's.

(N.C.) Data not comparable inasmuch as Texaco's 1984 gallonage included that of Getty, which is not reflected in prior years of 1980-1983.

pared by all of the states and relayed to Washington. This, too, is an on-highway and off-highway accumulation, so the figures are justifiably comparable to allow share-of-market percentages to be worked out.

The total sales figures used for the 1980-1983 period are the revised and final figures issued by FHA. The 1984 marketplace total is an estimate by *NPN* based on preliminary FHA reports from 47 states and projections for the three that were missing. Industry sources considered it an "agreeable ballpark figure which can't be too far off the mark."

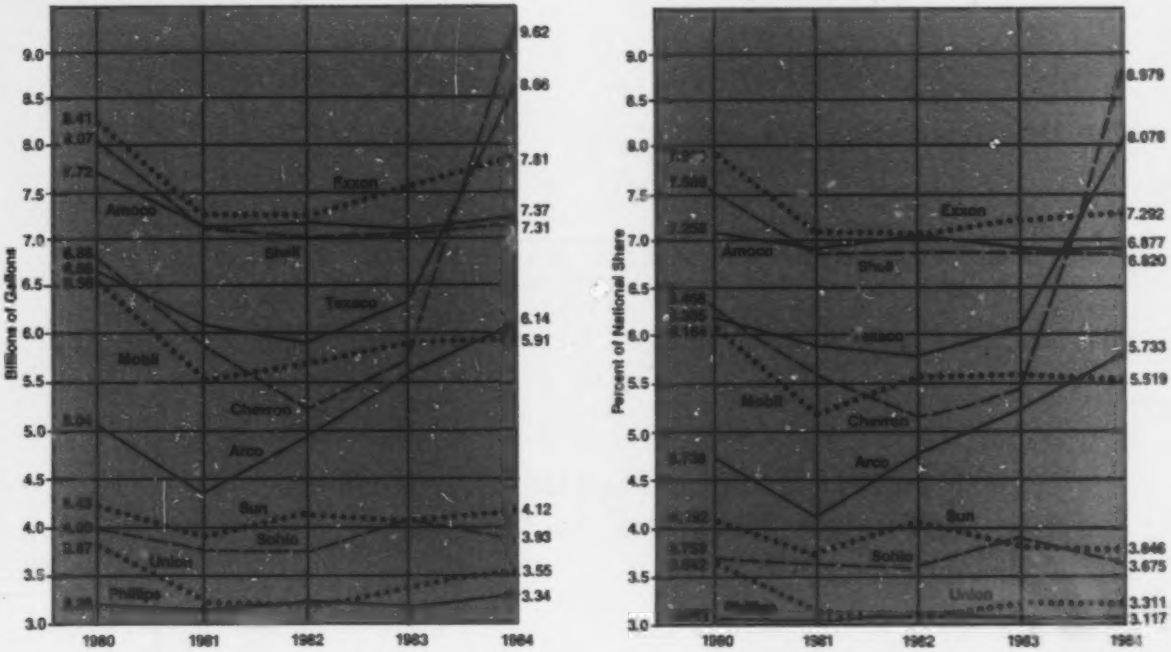
Besides the positioning of Exxon as the leading gasoline marketer, the *NPN* share-of-market report also includes some other unusual aspects. One is the inclusion for the first time of Standard Oil Co. of Ohio in the top 12 oil companies. Sohio used to be discounted and ignored because it had been confined to the state of Ohio. Later, via satellites BP and Boron, it penetrated other markets, especially the Atlantic seaboard. Now, with its 1985 acquisition of the old Gulf properties in the Southeast, it can be assumed it will be a much stronger competitor in 1985 and thereafter. The gasoline sales figures, retrospectively, show that it has ranked no worse than 10th over the past five years.

Another interesting sidelight was the fact that the top 12 oil companies marketed close to two out of every three gallons of gasoline sold in recent years. In 1980, the top 12 had 67% of the national market, but this figure eroded slowly so that in 1984 it was down to 63.2%.

THE BIG PICTURE

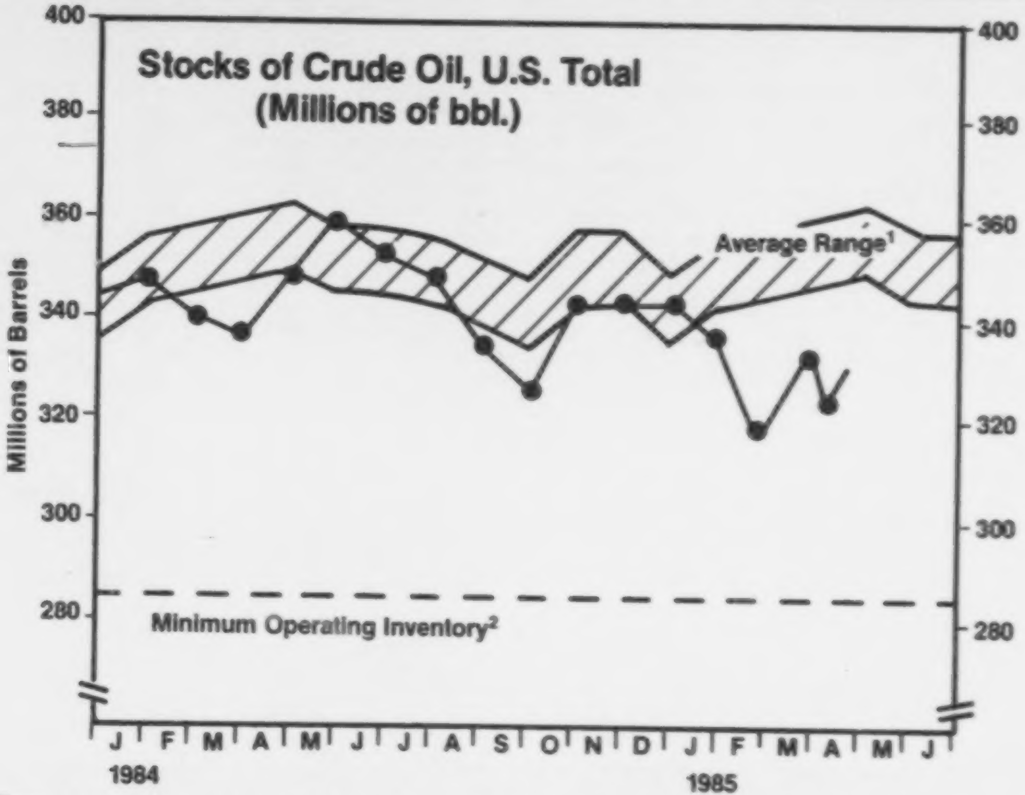
In Billions of Gallons . . .

. . . and by Market Shares

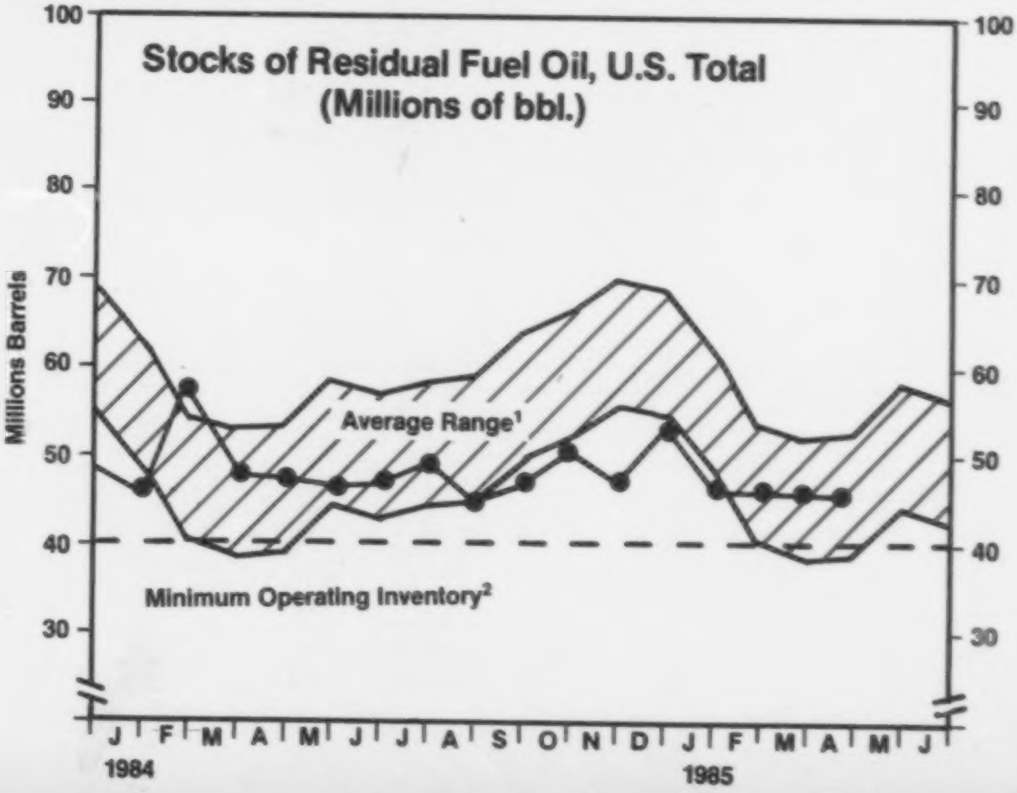


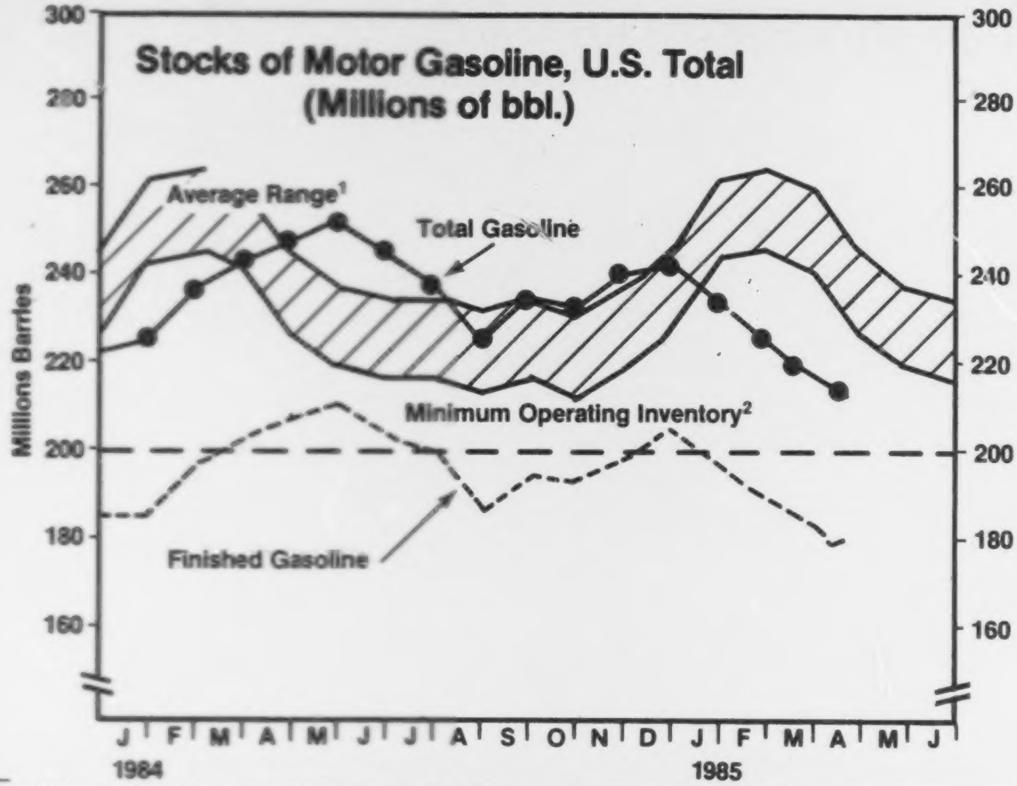
1982 (Total Sales Equal 102,747,065,000 gal.)				1981 (Total Sales Equal 104,150,406,000 gal.)				1980 (Total Sales Equal 106,448,704,000 gal.)		
Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '82 vs. '81	Rank	% Mkt. Shr.	(Add 000) Gallonage	% Chng. '81 vs. '80	Rank	% Mkt. Shr.	(Add 000) Gallonage
7	5.282%	5,426,820	(8.5%)	6	5.697%	5,933,710	(13.8%)	4	6.466%	6,883,170
5	5.789	5,948,040	(4.0)	4	5.947	6,193,320	(7.1)	5	6.365	6,668,510
1	7.192	7,389,060	.06	1	7.050	7,343,070	(12.8)	1	7.906	8,416,170
2	7.115	7,312,410	.06	2	6.977	7,266,420	(6.0)	3	7.258	7,726,320
3	6.848	7,036,470	(1.5)	3	6.918	7,205,100	(10.8)	2	7.589	8,078,910
8	4.834	4,916,920	11.0	8	4.298	4,476,360	(11.2)	8	4.738	5,043,570
6	5.640	5,794,740	4.1	7	5.343	5,564,790	(15.2)	6	6.164	6,561,240
9	4.103	4,215,750	7.4	9	3.768	3,924,480	(11.4)	9	4.162	4,430,370
10	3.641	3,740,520	(.08)	10	3.261	3,771,180	(2.3)	10	3.759	4,001,130
11	3.165	3,251,493	3.3	12	3.204	3,337,341	(13.9)	12	3.642	3,876,957
12	3.223	3,311,280	(2.6)	11	3.076	3,203,970	(2.3)	11	3.082	3,280,620
4	5.940	6,103,340	(.07)	5	5.902	6,147,330	(3.1)	7	5.962	6,346,620
	62.72 %	64,446,843	.12		61.80 %	64,367,071	(9.7)		66.99 %	71,313,587

Sources: Oil company annual reports and statistical supplements, plus special direct reports to *NPN*. Gross gallonage totals for each year are those of Federal Highway Administration except 1984 which is FHA data for 47 states and an *NPN* estimate for the other three. FHA data is for all uses—on- and off-highway. Since the off-highway consumption has averaged only 3.25% over the past six years, it is not considered significant in the market share ratios.



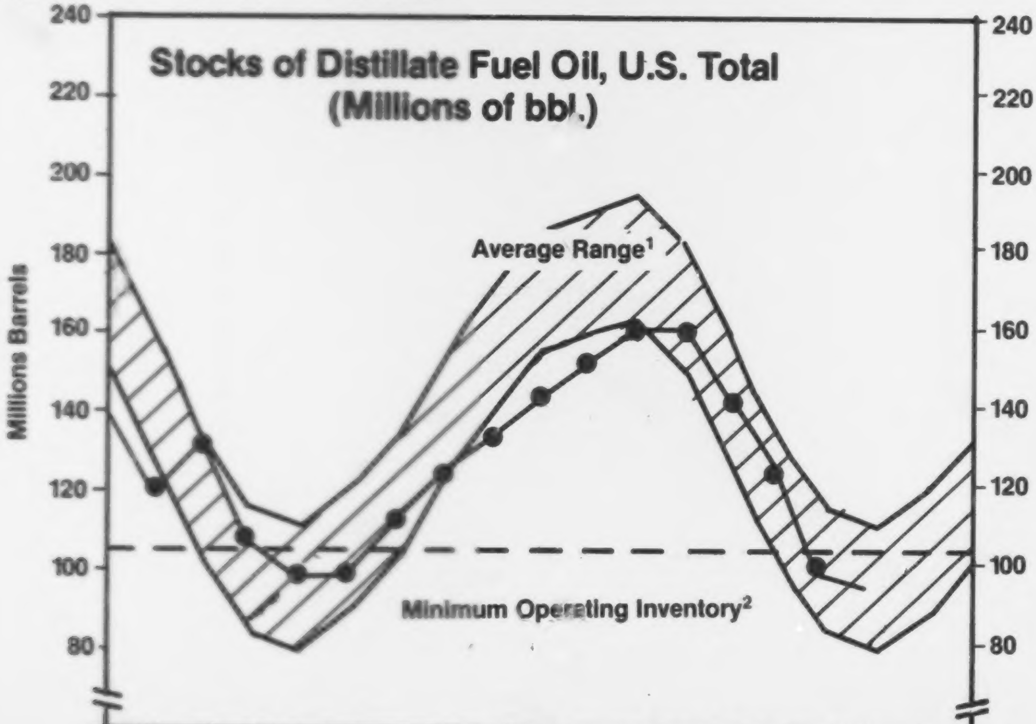
Crude Stocks at Primary Levels include those held at refineries, in pipelines, and in lease tanks, but do not include those held in the Strategic Petroleum Reserve operated by the U.S. Government. (1) The average level and width of average range are based on three years of monthly data for the period of July 1981 and June 1984. The seasonal pattern is based on seven years of monthly data. (2) National Petroleum Council defines the Minimum Operating Inventory as the minimum level required for routine operation. By its definition, runouts and shortages could occur if inventory levels fall below that level for any extended period of time. NPC revised its minimum operating levels late in 1983.
Source: Department of Energy, Weekly Statistical Reports, April 1985.





Product stocks at the Primary Level include those held at refineries, in pipelines, and at major bulk terminals. They do not include stocks held in secondary distribution facilities such as jobber tanks, consumer tanks, and/or barges designed for consumer markets. (1) The average level and width of average range are based on three years of monthly data for the period of July 1981 through June 1984. The seasonal pattern is based on seven years of monthly data. (2) National Petroleum Council defines the Minimum Operating Inventory as the minimum level required for routine operation. By its definition, runouts and shortages could occur if inventory levels fall below that level for any extended period of time. NPC revised its minimum operating levels in late 1983.

Source: Energy Information Administration, Weekly Statistical Reports, April 1985.



Stocks of Motor Gasoline

(Add 000,000 bbl.)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Finished Gasoline	185.5	196.6	202.8	207.4	210.7	204.1	200.1	186.6	194.5	193.2	198.4	205.4
Blending Components	39.9	40.5	40.5	40.6	42.1	41.3	38.4	38.5	40.1	39.4	41.6	38.1
Total Gasoline	225.5	237.1	243.2	248.0	252.7	245.4	238.5	225.1	234.6	232.5	240.0	243.5
East Coast	61.4	65.2	65.2	66.9	71.1	69.3	72.2	66.0	64.9	63.3	63.5	67.8
Midwest	63.2	68.4	71.1	71.4	68.3	65.5	64.7	62.7	66.9	65.5	67.5	72.4
Gulf Coast	62.6	66.2	71.1	72.5	73.0	71.0	65.2	63.2	69.8	69.6	71.3	63.6
Rocky Mountain	8.4	8.7	9.0	8.7	8.8	7.9	7.5	6.4	6.2	6.3	7.0	7.9
West Coast	29.9	28.6	26.8	28.5	31.5	31.7	29.0	26.9	26.8	27.9	30.7	31.8
1983 (a)												
Finished Gasoline	207.2	206.5	182.7	182.8	185.3	182.8	189.8	184.8	189.3	187.1	196.0	185.5
Blending Components	42.5	43.8	40.4	37.9	37.8	39.7	40.7	41.5	39.8	40.3	39.8	36.9
Total Gasoline	249.7	250.2	223.0	220.7	223.1	222.6	230.5	226.3	229.1	227.4	235.8	222.4
East Coast	70.2	66.0	55.3	60.8	63.1	61.3	64.4	62.6	64.1	61.7	63.5	63.8
Midwest	75.2	77.4	68.3	65.3	63.7	63.7	64.2	64.4	65.4	64.4	68.4	63.7
Gulf Coast	63.9	65.5	65.4	62.6	63.9	64.2	65.3	62.4	64.8	67.9	69.9	60.1
Rocky Mountain	9.4	9.4	8.3	7.9	7.4	6.7	6.4	5.9	5.9	6.3	7.4	7.7
West Coast	31.0	31.9	25.8	24.1	25.0	26.6	30.3	30.8	28.9	27.1	26.6	27.0

Stocks of Distillate Fuel Oil

(Add 000,000 bbl.)

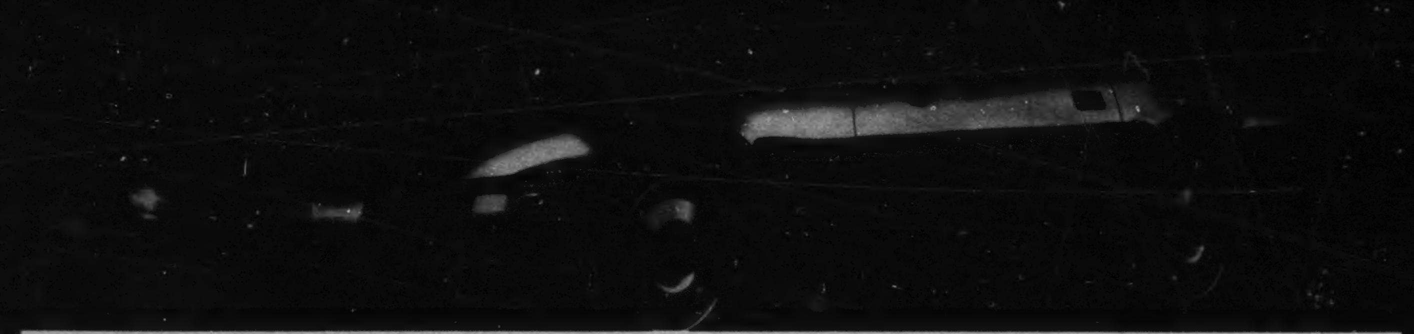
	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Total U.S.	119.5	132.2	109.6	97.8	98.2	112.9	124.5	133.5	143.2	152.4	160.8	161.1
East Coast	43.4	54.4	37.3	29.8	32.5	39.9	45.3	49.2	57.5	71.8	74.9	72.8
Midwest	37.1	37.0	33.5	30.2	27.1	31.7	36.2	39.3	38.6	36.4	37.5	43.7
Gulf Coast	24.7	26.8	24.2	23.0	23.6	26.1	28.2	30.6	32.5	29.9	33.0	29.0
Rocky Mountain	3.4	3.2	3.4	3.3	3.4	3.5	3.6	3.5	3.3	3.2	3.5	3.7
West Coast	10.8	10.8	11.3	11.5	11.5	11.6	11.3	11.0	11.2	11.0	11.9	11.9
1983 (a)												
Total U.S.	167.6	148.2	118.1	103.1	108.9	113.7	130.7	142.4	154.0	162.6	161.2	140.3
East Coast	71.1	55.5	38.0	31.8	36.9	41.0	50.9	61.7	67.5	74.6	70.7	57.7
Midwest	47.1	46.5	39.0	33.2	30.4	29.6	33.3	36.3	38.6	40.3	42.8	40.2
Gulf Coast	31.2	28.9	26.7	26.0	28.7	29.7	32.4	30.8	34.4	34.4	33.8	27.8
Rocky Mountain	4.1	4.0	3.3	2.8	2.9	2.8	3.0	3.0	2.7	2.6	2.8	3.3
West Coast	14.0	13.4	11.1	9.3	9.9	10.6	11.0	10.6	10.8	10.7	11.2	11.3

Stocks of Residual Fuel Oil

(Add 000,000 bbl.)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Total U.S.	45.4	57.6	47.6	47.4	46.3	46.8	49.2	44.7	47.0	50.8	47.2	53.2
East Coast	21.0	30.8	24.4	22.7	23.1	21.9	24.7	21.9	25.0	26.8	24.2	29.1
Midwest	3.6	4.2	4.1	3.5	3.9	3.6	3.5	3.6	3.5	3.8	3.7	3.5
Gulf Coast	11.8	12.9	9.9	10.9	10.1	11.2	9.8	9.2	9.8	10.2	10.4	11.2
Rocky Mountain	0.4	0.4	0.5	0.5	0.6	0.5	0.6	0.5	0.5	0.7	0.6	0.6
West Coast	8.7	9.4	8.7	9.7	8.6	9.6	10.6	9.4	8.1	9.4	8.3	8.7
1983 (a)												
Total U.S.	60.5	53.3	46.3	46.6	51.0	49.9	51.9	48.3	49.7	51.2	54.2	48.5
East Coast	29.8	25.3	20.6	20.2	23.8	24.2	25.3	23.8	23.5	25.2	29.3	24.8
Midwest	5.0	4.4	3.6	3.4	3.5	3.7	3.7	3.7	3.5	3.8	3.6	4.0
Gulf Coast	16.2	14.0	12.8	13.4	14.5	13.1	13.7	13.2	13.8	13.5	12.3	11.0
Rocky Mountain	0.5	0.4	0.4	0.5	0.5	0.4	0.5	0.5	0.5	0.5	0.4	0.5
West Coast	8.9	9.1	8.9	9.0	8.5	8.4	8.6	7.1	8.5	8.3	8.5	8.2

(a) Methodology and reporting procedures were changed in 1983, thus making comparisons with earlier data not practical.
Source: Energy Information Administration, Weekly Petroleum Status Reports.



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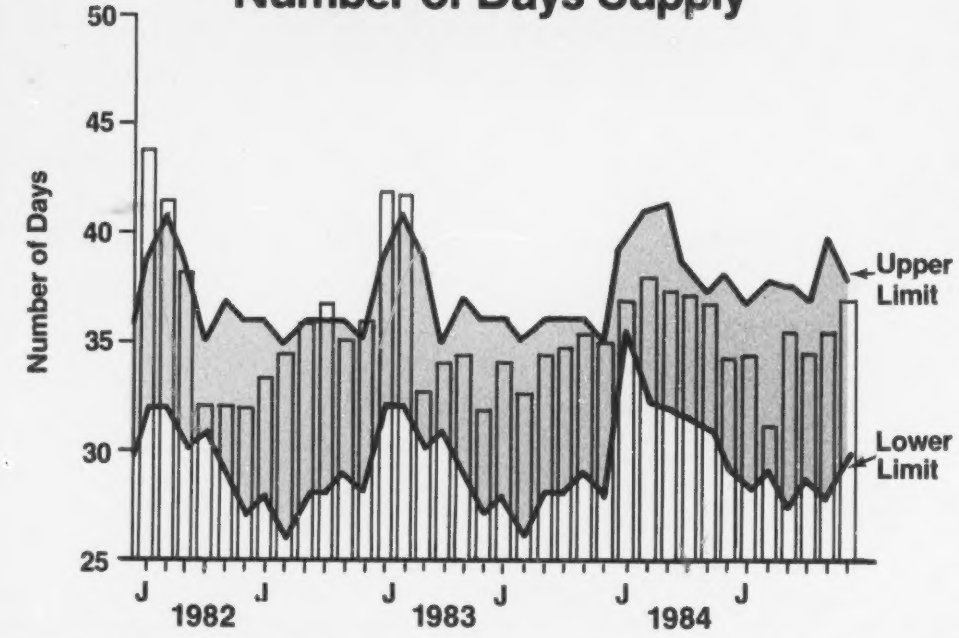
Refinery and Bulk Terminal Stocks By States and PAD Regions—1984

(Add 000 bbl.)

State	Leaded Motor Gasoline	Unleaded Motor Gasoline	Kerosine	Distillate Fuel Oil	Residual Fuel Oil
PAD District 1 Total	**20,543**	**27,547**	**5,685**	**63,695**	**29,087**
Connecticut	571	964	110	2,911	922
Delaware, D.C., Maryland	830	1,511	645	5,361	2,987
Florida	2,451	3,237	312	2,303	1,048
Georgia	1,498	1,616	118	1,401	250
Maine	326	609	113	1,421	396
Massachusetts	1,028	1,093	62	4,358	721
New Hampshire, Vermont	100	115	w	903	187
New Jersey	2,998	4,967	1,124	17,726	12,410
New York	2,792	3,677	587	9,904	5,389
North Carolina	1,455	1,519	764	1,952	466
Pennsylvania	3,443	4,587	1,027	8,785	2,182
Rhode Island	291	545	w	1,790	127
South Carolina	912	1,097	279	1,403	546
Virginia	1,606	1,781	401	3,238	1,399
West Virginia	241	229	40	239	57
PAD District 2 Total	**23,173**	**22,901**	**2,804**	**33,737**	**3,547**
Illinois	4,298	4,973	358	6,464	822
Indiana	3,168	2,974	564	4,744	552
Iowa	988	849	w	1,570	w
Kansas	1,772	1,622	75	2,406	74
Kentucky	1,038	1,234	215	1,571	275
Michigan	2,354	2,245	216	3,018	344
Minnesota	1,383	1,026	w	2,362	284
Missouri	952	770	w	978	w
Nebraska	395	150	0	391	0
North & South Dakota	413	283	0	1,025	w
Ohio	2,608	3,256	734	3,882	418
Oklahoma	1,244	1,144	279	1,734	184
Tennessee	1,251	1,203	121	1,324	206
Wisconsin	1,309	1,172	w	2,268	97
PAD District 3 Total	**12,775**	**16,138**	**1,733**	**19,357**	**11,221**
Alabama	1,006	937	84	956	656
Arkansas	223	180	w	192	59
Louisiana	1,693	3,046	677	3,747	4,603
Mississippi	1,029	1,236	17	2,121	486
New Mexico	298	205	w	263	4
Texas	8,526	10,532	941	12,078	5,413
PAD District 4 Total	**2,509**	**1,892**	**25**	**3,089**	**608**
Colorado	629	626	0	547	152
Idaho	263	106	0	253	0
Montana	614	425	w	989	109
Utah	326	269	0	625	242
Wyoming	677	466	w	675	105
PAD District 5 Total	**10,014**	**11,361**	**284**	**11,017**	**8,586**
Alaska	503	351	w	1,349	w
Arizona	410	294	w	378	0
California	5,578	7,566	197	5,314	6,146
Hawaii	274	234	0	296	w
Nevada	155	235	w	187	w
Oregon	971	751	w	1,181	302
Washington	2,123	1,930	w	2,312	1,121
U.S. Total	**69,014**	**79,837**	**10,531**	**130,895**	**53,049**

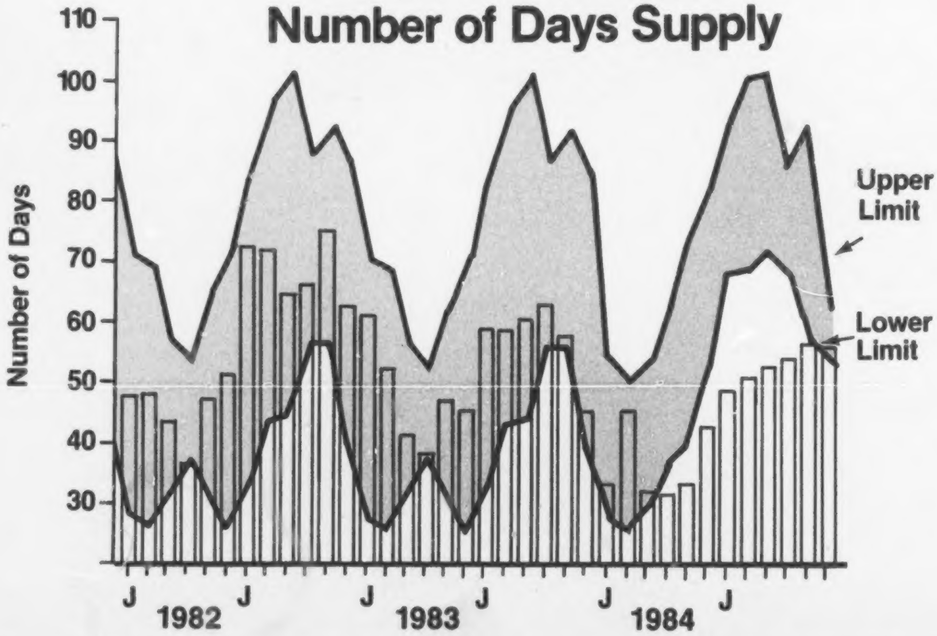
W = Withheld to avoid disclosure of individual company data.
Source: Energy Information Administration, December 1984, published in February 1985.

Gasoline Inventories
Number of Days Supply



Sources: Dept. of Energy, American Petroleum Inst. Historical Range based on highest and lowest value between 1973 and 1980

Distillate Inventories
Number of Days Supply



Sources: Dept. of Energy, American Petroleum Inst. Historical Range based on highest and lowest value between 1973 and 1980

Petroleum Products Supplied

(Millions of b/d)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Motor Gasoline	6.3	6.2	6.5	6.7	6.9	7.1	6.8	7.1	6.6	6.7	6.8	6.6
Jet Fuel	1.2	1.1	1.1	1.1	1.1	1.1	1.2	1.2	1.2	1.2	1.2	1.2
Distillate Fuel Oil	3.5	2.8	3.3	2.9	2.8	2.6	2.5	2.6	2.7	2.8	2.8	2.8
Residual Fuel Oil	2.0	1.6	1.6	1.4	1.2	1.3	1.2	1.3	1.2	1.1	1.4	1.2
Other	3.8	3.6	3.5	3.4	3.5	3.6	3.8	3.9	3.7	3.8	3.5	3.6
Total	16.7	15.4	16.0	15.5	15.6	15.7	15.5	16.1	15.3	15.6	15.6	15.4
1983												
Motor Gasoline	6.1	6.0	6.8	6.5	6.6	7.0	6.8	6.9	6.7	6.6	6.6	6.8
Jet Fuel	1.0	1.1	1.0	1.0	1.0	1.1	1.1	1.1	1.1	1.0	1.0	1.2
Distillate Fuel Oil	2.8	2.8	2.9	2.7	2.4	2.5	2.3	2.5	2.6	2.6	2.9	2.4
Residual Fuel Oil	1.6	1.6	1.6	1.4	1.3	1.3	1.3	1.4	1.4	1.2	1.4	1.6
Other	3.3	3.4	3.2	3.1	3.2	3.4	3.6	3.6	3.8	3.5	3.7	3.7
Total	14.7	14.8	15.5	14.7	14.5	15.3	15.0	15.5	15.5	15.0	15.5	16.7
1982												
Motor Gasoline	6.0	6.2	6.5	6.9	6.7	6.8	6.8	6.6	6.5	6.4	6.6	6.5
Jet Fuel	1.0	1.1	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.0	1.1	1.1
Distillate Fuel Oil	3.5	3.1	2.9	3.0	2.4	2.5	2.1	2.2	2.5	2.6	2.5	2.3
Residual Fuel Oil	2.2	2.3	1.9	1.9	1.6	1.5	1.6	1.5	1.5	1.5	1.6	1.6
Other	3.5	3.3	3.3	3.2	3.2	3.2	3.4	3.5	3.5	3.4	3.3	3.4
Total	16.1	16.0	15.6	16.0	14.8	15.0	14.8	14.8	15.0	14.9	15.0	15.5

Petroleum Products Imported

(Millions of b/d)

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984												
Finished Motor Gasoline	233	303	343	308	329	272	247	243	333	293	286	309
Jet Fuel	60	112	45	95	55	44	34	95	30	49	35	29
Distillate Fuel Oil	270	458	115	220	252	266	198	263	285	424	308	190
Residual Fuel Oil	1,061	1,107	633	637	554	676	596	572	596	461	588	627
Other Petroleum Products*	695	711	662	642	799	635	665	620	636	789	766	629
1983												
Finished Motor Gasoline	153	128	186	255	305	277	302	250	279	330	269	224
Jet Fuel	27	8	35	15	29	26	30	40	44	49	23	24
Distillate Fuel Oil	68	59	42	73	147	179	267	301	259	260	203	221
Residual Fuel Oil	691	647	686	753	738	677	684	739	706	638	780	649
Other Petroleum Products*	535	617	450	512	511	591	586	602	631	535	599	703
1982												
Finished Motor Gasoline	128	133	183	185	182	230	225	291	223	185	211	179
Jet Fuel	10	62	39	47	31	3	31	26	30	20	40	[illegible]
Distillate Fuel Oil	97	132	48	59	74	102	125	80	61	91	145	109
Residual Fuel Oil	831	956	912	788	742	652	657	550	872	783	836	747
Other Petroleum Products*	573	533	427	449	474	504	604	445	592	567	650	564

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*Includes imports of kerosine, unfinished oils, motor gasoline blending components, liquefied petroleum gases and other oils.

Source: Energy Information Administration, Weekly Petroleum Status Reports.

U.S. Crude Oil Production—1983-1974

(Thousands of b/d)

	1983	1982	1981	1980	1979	1978	1977	1976	1975	1974
PAD District 1										
Florida	53.4	70.2	95.3	117.2	129.2	130.2	127.8	121.5	114.7	99.6
New York	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.3	2.4	2.5
Pennsylvania	11.7	11.7	10.2	7.2	7.9	7.9	7.4	8.3	9.0	9.5
Virginia	0.2	0.1	**	**	**	**	**	**	**	**
West Virginia	9.9	8.9	9.5	6.4	6.6	6.5	6.9	6.9	6.8	7.3
Total	**77.5**	**93.2**	**117.3**	**133.1**	**146.0**	**146.9**	**144.4**	**139.0**	**132.9**	**118.9**
PAD District 2										
Illinois	80.0	75.9	66.0	62.0	59.7	64.0	70.2	71.8	71.4	75.5
Indiana	14.6	15.2	12.9	13.6	12.9	12.8	14.6	12.7	12.7	13.5
Kansas	196.1	193.2	180.3	164.3	156.2	155.0	157.5	160.4	161.9	169.0
Kentucky	21.6	20.2	17.9	16.2	15.1	15.7	18.0	20.4	20.7	21.5
Michigan	86.9	86.2	89.5	97.8	95.5	95.0	90.3	83.1	66.9	49.4
Nebraska	17.5	18.8	18.3	17.0	16.6	16.1	16.4	16.9	16.8	18.1
North Dakota	138.9	129.5	124.4	110.2	84.7	68.0	63.8	59.4	56.0	54.0
Ohio	41.0	39.9	37.1	35.3	32.8	30.6	28.4	27.3	26.2	24.9
Oklahoma	434.5	434.6	422.1	410.2	393.6	412.2	428.4	441.0	446.9	487.1
South Dakota	3.2	3.2	2.7	2.1	2.3	2.4	1.7	1.2	1.3	1.3
Other (a)	3.6	3.7	3.2	2.4	1.9	1.8	2.4	1.8	2.0	2.2
Total	**1,037.9**	**1,020.4**	**974.4**	**931.1**	**871.3**	**873.6**	**891.7**	**896.0**	**882.8**	**916.5**
PAD District 3										
Alabama	51.4	54.8	56.6	60.5	52.5	54.3	50.0	40.2	36.9	36.5
Arkansas	51.6	51.6	50.3	49.8	51.7	55.7	55.3	49.5	44.2	45.3
Louisiana	1,313.9	1,255.9	1,231.0	1,281.8	1,341.6	1,459.6	1,542.2	1,657.1	1,783.1	2,020.0
Mississippi	86.2	90.5	93.7	98.2	102.3	115.1	117.9	125.9	127.7	139.1
New Mexico	205.9	194.6	196.1	205.1	218.2	228.4	239.0	251.7	260.5	270.4
Texas	2,473.0	2,535.1	2,589.4	2,670.6	2,789.3	2,942.6	3,117.5	3,250.0	3,347.8	3,457.9
Total	**4,182.0**	**4,182.5**	**4,217.1**	**4,366.0**	**4,555.6**	**4,855.7**	**5,121.9**	**5,374.4**	**5,600.2**	**6,969.2**
PAD District 4										
Colorado	79.6	83.7	83.0	81.4	88.5	100.8	108.1	106.5	104.4	102.8
Montana	80.1	84.7	84.4	80.0	82.1	83.5	89.5	89.7	90.0	94.7
Utah	80.9	61.5	70.9	68.2	76.0	85.9	90.7	93.7	115.9	107.8
Wyoming	324.1	324.1	357.7	345.2	361.3	376.4	373.9	366.5	372.5	383.5
Total	**564.7**	**554.0**	**596.0**	**574.8**	**607.9**	**646.6**	**662.2**	**656.4**	**682.8**	**688.8**
PAD District 5										
Alaska	1,713.8	1,695.6	1,609.1	1,616.6	1,400.9	1,229.1	463.6	173.2	191.3	193.4
Arizona	0.6	0.9	1.0	1.1	1.3	1.1	1.2	1.4	1.7	2.0
California	1,108.7	1,100.2	1,054.7	975.2	965.1	951.2	957.8	890.8	882.7	885.0
Nevada	2.2	1.7	1.9	2.4	3.4	3.2	1.8	0.4	0.3	0.4
Total	**2,825.3**	**2,798.4**	**2,666.7**	**2,595.3**	**2,370.7**	**2,184.6**	**1,424.4**	**1,065.8**	**1,076.0**	**1,080.8**
Total U.S.	**8,688**	**8,648**	**8,571**	**8,600**	**8,551**	**8,707**	**8,244**	**8,131**	**8,374**	**8,774**

**Less than 100 barrels per day.

(a) Missouri and Tennessee.

Source: Independent Petroleum Assn. of America, "The Oil industry in Your State, 1984."

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Always has. Always will.**

Domestic Supply Trend (Add 000,000 bbl.)

Year	All products	Gasoline	Kerosine (a)	Distillate	Residual	LPG	Lubes	Other
1984 (b)	5,752	2,451	390	1,042	500	577	56	736
1983	5,585	2,417	353	982	519	551	53	710
1982	5,568	2,386	339	977	618	443	51	754
1981	5,861	2,404	342	1,032	762	407	56	858
1980	6,932	2,536	397	1,389	1,033	414	58	1,105
1979	6,758	2,568	388	1,210	1,032	456	66	1,038
1978	6,879	2,705	377	1,253	1,103	358	63	1,020
1977	6,710	2,633	350	1,223	1,121	369	58	956
1976	6,391	2,567	351	1,147	1,025	381	56	864
1975	5,958	2,436	347	1,041	899	362	50	823
1973	6,317	2,453	386	1,124	1,030	404	59	851
1971	5,552	2,213	385	971	838	369	49	727
1970	5,364	2,131	358	927	804	363	50	731
1965	4,202	1,720	220	776	587	307	47	545
1960	3,610	1.512	132	685	559	227	43	427

(a) Kerosine includes jet fuel; (b) Preliminary.

Source: Petroleum Supply Monthly, Energy Information Administration, December 1984, published in February 1985.

U.S. Estimated Petroleum Balance—1984 (Add 000 b/d)

Products Supplied/Supply From Primary Storage (a)	Full year			4th Quarter			3rd Quarter			2nd Quarter		
	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.
Products Supplied:												
Motor gasoline, total	6,702	6,622	1.2%	6,720	6,680	0.6%	6,894	6,810	1.2%	6,899	6,687	3.2%
Finished leaded gasoline	2,715	2,975	(8.7)	2,555	2,889	(11.6)	2,746	3,052	(10.0)	2,883	3,074	(6.2)
Finished unleaded gasoline	3,987	3,647	9.3	4,165	3,791	9.9	4,148	3,758	10.4	4,016	3,613	11.2
Naphtha-Jet	225	207	8.7	231	192	20.3	250	212	17.9	221	209	5.7
Kerosine-Jet	954	839	13.7	1,008	872	15.6	935	864	8.2	923	829	11.3
Distillate Fuel oil	2,874	2,690	6.8	2,924	2,950	(0.9)	2,608	2,445	6.7	2,801	2,523	11.0
Residual Fuel oil	1,358	1,421	(4.4)	1,179	1,397	(15.6)	1,281	1,350	(5.1)	1,322	1,346	(1.8)
All other oils	3,870	3,619	6.9	3,900	3,826	1.9	3,944	3,838	2.8	3,624	3,329	8.9
Reclassified	−211	−166	27.1	−184	−184	—	−228	−184	23.9	−185	−97	90.7
Total domestic products supplied	15,772	15,232	3.5	15,778	15,773	0.3	15,684	15,335	7.3	15,605	14,826	5.3
Exports	677	739	(8.4)	636	631	0.8	672	639	5.2	709	811	(12.6)
Total Products Supplied	**16,449**	**15,971**	**3.0**	**16,414**	**16,364**	**0.3**	**16,356**	**15,974**	**2.4**	**16,314**	**15,637**	**4.3**
Supply:												
Domestic production												
Crude oil	8811	8,688	1.4	8,831	8,644	2.2	8,790	8,699	1.0	8,719	8,691	0.3
Natural gas liquids	1,644	1,559	5.5	1,701	1,598	6.6	1,636	1,567	4.4	1,587	1,507	5.3
Other supply	881	654	34.7	885	605	46.3	652	569	14.6	1,044	765	36.5
Total domestic supply	11,336	10,901	4.0	11,417	10,845	5.3	11,078	10,835	2.2	11,350	10,963	3.5
Imports:												
Crude oil, total	3,209	3,096	3.6	3,280	3,143	4.4	3,361	3,790	(11.3)	3,497	3,123	12.0
Canadian	328	274	19.7	323	294	9.9	274	301	(9.0)	407	252	61.5
Other	2,881	2,822	2.1	2,957	2,849	3.8	3,087	3,489	(11.5)	3,090	2,871	7.6
Products, total	1,978	1,732	14.9	1,921	1,835	4.7	1,765	1,907	(7.4)	1,934	1,696	14.0
Residual Fuel oil	663	699	(5.2)	514	688	(25.3)	575	710	(19.0)	668	723	(7.6)
Other	1,315	1,023	28.5	1,407	1,147	22.7	1,190	1,197	(0.6)	1,226	973	30.1
Total imports	5,187	4,818	7.7	5,201	4,978	4.5	5,126	5,697	(10.0)	5,431	4,819	12.7
Total supply	**16,523**	**15,719**	**5.1**	**16,618**	**15,823**	**5.0**	**16,204**	**16,532**	**(2.0)**	**16,781**	**15,782**	**6.3**

(a) Preliminary for 1984

Source: American Petroleum Institute, Monthly Statistical Reports.

U.S. Refinery Operations (Add 000 b/d)

Refinery Operations (a)	Full year			4th Quarter			3rd Quarter			2nd Quarter		
	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.
Input to crude oil distillation units	12,225	11,947	2.3%	12,115	11,869	2.1%	12,426	12,565	(1.1)%	12,364	12,139	1.9%
Operable capacity	16,081	16,668	(3.5)	16,047	16,337	(1.8)	16,078	16,630	(3.3)	16,219	16,850	(3.7)
Refinery Utilization (%)	76.0%	71.7%	6.0	75.5%	72.7%	3.9	77.3%	75.6%	2.2	76.2%	72.0%	5.8
Crude oil runs	12,057	11,685	3.2	11,953	11,670	2.4	12,282	12,330	(0.4)	12,166	11,839	2.8

(a) Preliminary for 1984 data.

Source: American Petroleum Institute, Monthly Statistical Reports.

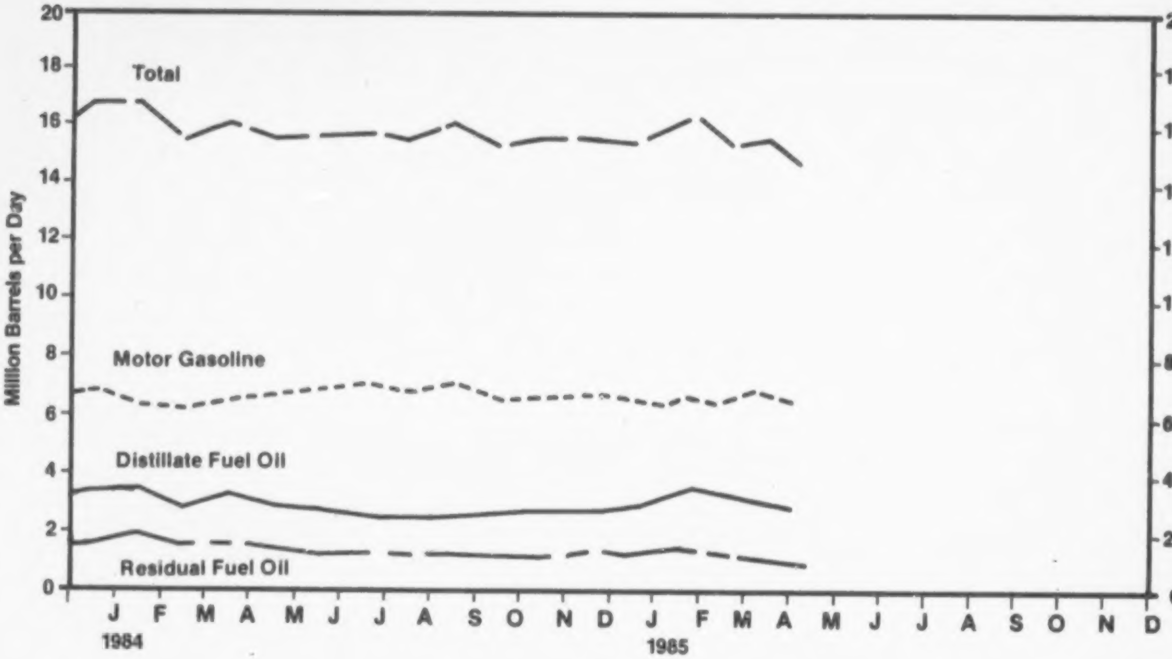
Crude and Product Inventories (Add 000,000 bbl.)

Stocks (a)	Full year			4th Quarter			3rd Quarter			2nd Quarter		
	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.	1984	1983	% Chng.
Crude oil (b)	337.0	343.9	(2.0)%	337.0	343.9	(2.0)%	330.4	346.7	(4.7)%	356.1	350.5	1.6%
Unfinished oils	96.7	108.0	(10.5)	96.7	108.0	(10.5)	108.9	112.9	(3.5)	109.0	110.8	(1.6)
Total motor gasoline	241.0	222.4	8.4	241.0	222.4	8.4	228.8	229.1	(0.1)	249.6	222.6	12.1
Finished leaded motor gasoline	91.5	94.1	(2.8)	91.5	94.1	(2.8)	84.5	94.6	(10.7)	98.1	95.1	3.2
Finished unleaded motor gasoline	110.4	91.4	20.8	110.4	91.4	20.8	105.2	94.7	11.1	109.4	87.7	24.7
Naphtha-Jet	7.1	6.3	12.7	7.1	6.3	12.7	6.9	6.6	4.5	6.6	6.9	(4.3)
Kerosine-Jet	37.2	32.3	15.2	37.2	32.3	15.2	38.9	34.9	11.5	34.4	34.2	0.6
Distillate fuel oil	158.4	140.3	12.9	158.4	140.3	12.9	143.1	154.0	(7.1)	113.6	113.7	(0.1)
Residual fuel oil	54.2	48.5	11.8	54.2	48.5	11.8	47.5	49.7	(4.4)	49.2	49.9	(1.4)
All other oils	170.1	172.6	(1.6)	170.1	172.6	(1.6)	169.8	190.4	(10.8)	176.8	184.4	(4.1)
Total all oils	**1,101.7**	**1,074.5**	**2.5**	**1,101.7**	**1,074.5**	**2.5**	**1,074.3**	**1,124.3**	**(4.4)**	**1,095.3**	**1,073.0**	**2.1**

(a) Preliminary for 1984 data; (b) does not include oil imported for or included in Strategic Petroleum Reserve.

Source: American Petroleum Institute, Monthly Statistical Reports.

PETROLEUM PRODUCTS SUPPLIED
(Million Barrels per Day)



Role of Imports in Domestic Demand

Year	U.S. Imports Total (a) (Add 000)	b/d Avg.	% Change	Domestic Demand for Refined Products Total (Add 000)	b/d Avg.	% Change	Imports as % of U.S. Demand
1984 (b)	1,892,160	5,184	+7.6%	5,733,420	15,708	+3.1%	33.0%
1983	1,758,457	4,818	−5.8	5,559,364	15,231	−0.4	31.6
1982	1,866,358	5,113	−10.9	5,582,938	15,295	−4.7	33.4
1981	2,095,122	5,740	−16.4	5,861,058	16,058	−5.9	35.7
1980	2,512,636	6,865	−18.2	6,242,445	17,056	−7.9	40.3
1979	3,062,053	8,389	+2.3	6,757,077	18,513	−1.8	45.3
1978	2,993,847	8,202	−6.7	6,879,017	18,847	+2.3	43.5
1977	3,207,106	8,787	+20.2	6,727,468	18,431	+5.6	47.7
1976	2,676,411	7,313	+20.8	6,390,750	17,461	+7.2	41.9
1975	2,210,335	6,056	−0.9	5,957,515	16,322	−2.0	37.1
1974	2,230,947	6,112	−2.3	6,078,239	16,653	−3.8	36.7
1973	2,283,493	6,256	+32.0	6,317,303	17,308	+5.7	36.1
1972	1,735,314	4,741	+20.8	5,990,316	16,367	+7.6	29.0
1971	1,432,880	3,926	+14.8	5,552,560	15,212	+3.5	25.8
1970	1,248,062	3,419	+8.0	5,364,473	14,697	+4.0	23.3
1965	900,772	2,468	+9.3	4,202,039	11,512	+4.4	21.4
1960	664 111	1,815	+2.0	3,585,820	9,797	+2.8	18.5
1955	455,564	1,248	+18.6	3,089,348	8,464	+9.0	14.7
1950	310,261	850	+31.8	2,392,974	6,556	+13.0	13.0

(a) Crude oil and products but not crude for Strategic Petroleum Reserve; (b) Preliminary.
Source: American Petroleum Institute, Basic Petroleum Data Book, Petroleum Supply Monthly, Energy Information Administration

Petroleum Product Consumption—1983

(Add 000 bbl.)

	Motor Gasoline	Aviation Fuels	Middle Distillates[a]	Residual Fuel	Asphalt Road Oil	All Other[b]	Total
Alabama	34,811	886	18,516	5,118	4,582	20,589	84,502
Alaska	5,109	8,627	8,056	337	424	3,468	26,021
Arizona	30,231	3,244	8,219	88	2,030	11,005	54,817
Arkansas	22,760	359	14,342	1,283	2,257	12,925	53,926
California	253,531	39,087	68,412	58,705	13,700	91,985	525,420
Colorado	33,033	5,015	9,892	13	2,317	10,886	61,156
Connecticut	25,228	793	20,633	22,311	909	13,411	83,285
Delaware	6,310	79	3,128	5,485	256	2,756	18,014
District of Columbia	3,665	90	2,543	1,064	†	1,645	9,007
Florida	106,055	21,446	29,725	54,415	7,055	45,835	264,531
Georgia	61,779	12,558	19,679	4,307	6,445	20,660	125,428
Hawaii	7,307	5,744	4,762	12,228	319	7,667	38,027
Idaho	9,808	281	4,448	202	816	3,015	18,570
Illinois	89,339	13,042	31,388	11,793	6,613	63,518	215,693
Indiana	52,060	3,245	28,519	4,231	7,131	24,456	119,642
Iowa	28,310	495	16,335	291	1,976	22,414	69,821
Kansas	28,501	825	13,526	760	1,787	17,642	63,041
Kentucky	36,764	3,121	18,307	1,030	2,590	18,911	80,723
Louisiana	47,579	7,682	38,632	38,254	3,225	107,084	242,456
Maine	12,228	376	9,281	12,670	721	7,423	42,699
Maryland	41,495	2,156	17,151	9,535	5,346	13,386	89,069
Massachusetts	45,057	5,990	32,006	34,810	1,394	35,073	154,330
Michigan	80,843	3,683	23,314	3,192	3,375	29,252	143,659
Minnesota	34,765	3,348	20,621	1,594	5,815	23,139	89,282
Mississippi	24,118	1,613	12,840	4,326	2,100	11,488	56,485
Missouri	50,110	4,534	20,961	818	4,214	25,547	106,184
Montana	9,036	541	5,949	1,512	1,393	3,030	21,461
Nebraska	17,106	643	8,993	170	824	8,956	36,692
Nevada	9,201	4,023	3,597	39	926	2,563	20,349
New Hampshire	4,481	60	5,163	3,568	482	4,592	18,346
New Jersey	92,489	30,051	46,091	28,095	7,533	40,370	244,629
New Mexico	13,181	774	9,236	529	2,187	35,561	61,468
New York	93,263	2,223	62,644	79,354	7,065	81,894	326,443
North Carolina	53,310	3,605	23,010	4,372	3,964	27,930	116,191
North Dakota	6,277	179	7,041	954	1,343	4,332	20,126
Ohio	98,776	4,609	41,381	2,090	8,313	64,416	219,585
Oklahoma	39,249	3,101	14,615	603	5,339	19,928	82,835
Oregon	28,391	1,479	15,070	7,726	2,679	8,483	63,828
Pennsylvania	108,752	7,471	55,394	24,008	4,911	32,090	232,626
Rhode Island	9,522	264	3,982	1,203	1,494	5,217	21,682
South Carolina	29,723	488	10,325	2,255	2,344	12,350	57,485
South Dakota	8,143	213	4,999	44	658	4,289	18,346
Tennessee	49,365	1,614	20,178	647	3,697	19,012	94,513
Texas	225,138	34,913	103,884	50,898	14,446	235,964	665,243
Utah	13,121	2,026	6,885	802	1,011	7,843	31,688
Vermont	2,368	49	3,137	271	78	3,880	9,783
Virginia	55,672	7,115	22,757	7,328	3,479	17,958	114,309
Washington	43,805	9,169	18,306	8,791	2,847	17,602	100,520
West Virginia	13,933	217	7,938	1,050	503	10,491	34,132
Wisconsin	33,883	1,442	20,484	1,954	2,515	24,221	84,499
Wyoming	7,000	152	11,962	1,481	488	5,694	26,797
TOTAL	**2,235,981**	**264,740**	**1,028,279**	**518,604**	**167,916**	**1,343,844**	**5,559,364**

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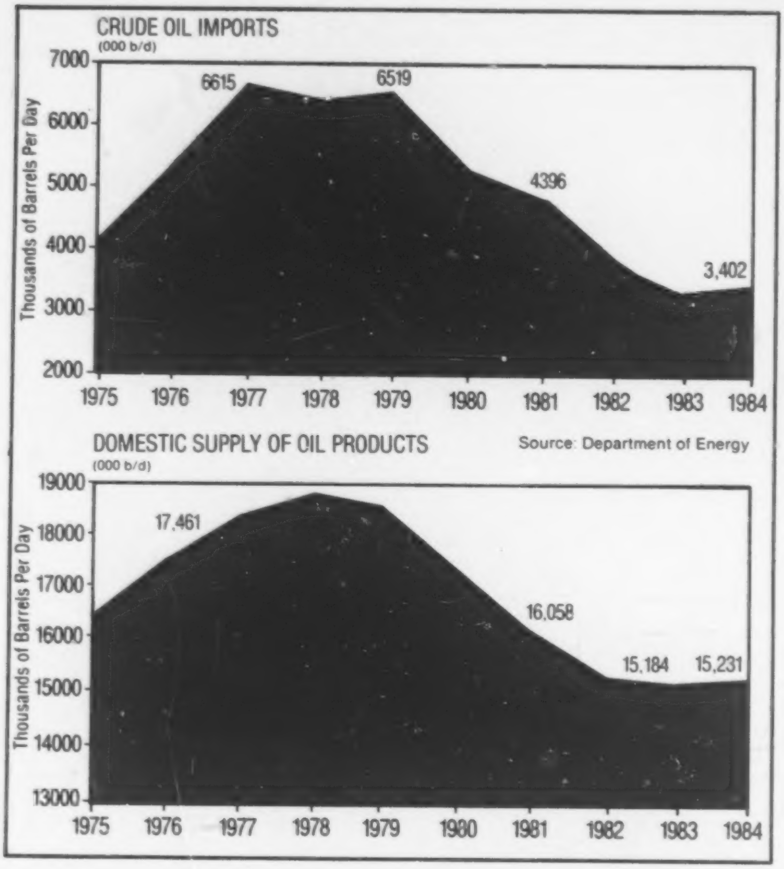
[a] Includes kerosine.

[b] Includes LPG, naphtha, lubricants, waxes, petroleum coke and still gas.

†Included with Maryland data.

Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State, 1984."



Source: Department of Energy

Unleaded Gasoline: The Growth by Years

(Add 000 b/d)

	Total Gasoline Consumption	Unleaded Gasoline Consumption	Unleaded Percent of total
1973 Ave.	**6,674**	**NA**	**NA**
1974 Ave.	**6,537**	**NA**	**NA**
1975 Ave.	**6,675**	**NA**	**NA**
1976 Ave.	**6,978**	**NA**	**NA**
1977 Ave.(a)	**7,177**	**1,976**	**27.5**
1978 Ave.	**7,412**	**2,521**	**34.0**
1979 Ave.	**7,034**	**2,798**	**39.8**
1980 Ave.	**6,579**	**3,067**	**46.6**
1981 Ave.	**6,588**	**3,264**	**49.5**
1982 Ave.	**6,539**	**3,409**	**52.1**
1983 Ave.	**6,622**	**3,647**	**55.1**
1984 January	6,268	3,606	57.5
February	6,237	3,585	57.5
March	6,512	3,747	57.5
April	6,682	3,854	57.7
May	6,873	3,990	58.1
June	7,092	4,210	59.4
July	6,849	4,094	59.8
August	7,114	4,263	59.9
September	6,614	3,962	60.2
October	6,730	4,074	60.5
November	6,805	4,243	62.3
December	6,580	4,185	63.6
Average	**6,698**	**3,987**	**59.5**

(a) Unleaded was mandated in July for all new model cars.
Source: Energy Information Administration, Monthly Energy Review.

Supply and Demand, Principal Products (Add 000 bbl.)

	Motor Gasoline	Aviation Gasoline	Distillate Fuel Oil	Residual Fuel Oil	Jet Fuel (a)	Lubricants	Asphalt
Domestic Supply							
1984 (b)	2,451,329	9,275	1,042,370	499,504	428,170	56,056	144,877
1983	2,417,084	9,444	981,927	518,604	381,783	53,426	136,241
Production							
1984 (b)	2,366,233	9,107	982,502	326,697	414,148	58,364	141,405
1983	2,313,354	8,050	896,504	310,863	373,161	53,808	135,659
Imports							
1984 (b)	106,607	603	98,742	246,617	20,721	3,676	5,048
1983	90,184	214	63,542	255,213	10,744	4,124	135,659

(a) Naphtha and kerosine based fuels: (b) Preliminary data.

U.S. Oil Imports (a) (Add 000 b/d)

Year	Crude Oil	Other Products	Residual Fuel Oil	Total Imports	% of Total U.S. Supply
1984 (b)	3,206	1,305	674	5,185	33.8%
1983	3,096	1,023	699	4,818	31.6
1982	3,323	849	776	4,948	32.3

(a) Does not include Strategic Petroleum Reserve; (b) Preliminary.
Source: Department of Energy, Monthly Energy Review and IPAA.

Origins of U.S. Oil Imports

	OPEC Sources		Arab OPEC		Hemispheres	
	Thous. b/d	% of total imports	Thous. b/d	% of total imports	Western Thous.	Eastern b/d
1984	2,043	37.7	806	14.9	2,792	2,633
1983	1,832	36.9	625	12.5	2,702	2,349
1982	2,146	42.0	854	16.7	2,423	2,690

Source: Independent Petroleum Assn. of America, preliminary report.

	Total Well Completions			Proved Reserves				Supply (Add 000 b/d)	
Year	Total (a)	Dry	% Dry	Crude Oil (b)	Crude Production/ Reserve Ratio	Natural Gas (c)	Natural Gas Production/ Reserve Ratio	Domestic Crude & Natl. Gas Lqds.	Crude & Product Imports
1984 (d)	84,135	25,222	30.0	NA	NA	NA	NA	10,390	5,381
1983	78,542	23,494	29.9	27,735	9.2	200.3	12.7	10,247	5,051
1982	88,106	26,549	30.1	27,858	9.4	201.5	11.5	10,199	5,113

(a) Includes oil, gas, service and dry completions; (b) Millions of bbl.; (c) Trillions of cubic feet; (d) Preliminary.
Source: Independent Petroleum Assn. of America and Energy Information Administration.

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IPAA '85 Forecast: Looks Like '84 All Over

(000 b/d except closing stocks)

	1st Q	2nd Q	3rd Q	4th Q	Est. '85	Est. '84	% Chng.
DEMAND							
Domestic Product Demand:							
Motor Gasoline	6,407	6,637	6,918	6,722	6,722	6,723	—
Aviation Fuels	1,165	1,168	1,193	1,178	1,177	1,165	1.0
Middle Distillates	3,321	2,916	2,746	3,183	3,040	3,007	1.1
Residual Fuel Oil	1,653	1,295	1,288	1,370	1,400	1,421	(1.5)
Liquefied Gases	1,765	1,386	1,417	1,719	1,571	1,570	—
Other Products	1,747	2,040	2,281	1,910	1,990	1,945	2.3
Total	16,058	15,842	15,826	16,080	15,900	15,831	0.4
Exports	680	718	675	680	686	694	(0.9)
TOTAL DEMAND	16,738	16,560	16,501	16,760	16,586	16,525	0.4
SUPPLY							
Domestic Production:							
Crude Oil	8,820	8,800	8,800	8,780	8,800	8,800	—
Nat'l Gas Liquids	1,588	1,569	1,576	1,595	1,587	1,605	(1.1)
Total	10,408	10,369	10,376	10,375	10,387	10,405	(0.2)
Imports:							
Crude Oil	3,336	3,633	3,862	3,632	3,617	3,360	7.6
Motor Gasoline	281	297	289	280	287	321	(10.6)
Aviation Fuels	59	65	54	50	57	57	—
Middle Distillates	240	238	268	267	253	268	(5.6)
Residual Fuel Oil	863	633	662	707	716	725	(1.2)
Liquefied Gases	251	189	195	241	219	209	4.8
Other Products	348	416	386	375	382	378	1.1
Total Imports	5,377	5,471	5,716	5,552	5,531	5,318	4.0
Other Supply	536	697	666	887	644	846	(23.9)
TOTAL SUPPLY	16,320	16,537	16,758	16,814	16,562	16,569	—
INVENTORIES							
Closing Stocks (000,000 bbl.):							
Motor Gasoline	239.3	232.9	222.3	225.3	225.3	229.5	(1.8)
Aviation Fuels	45.0	45.8	44.7	43.3	43.3	42.8	(1.2)
Middle Distillates	121.4	123.8	157.2	156.3	156.3	159.6	(2.7)
Residual Fuel Oil	45.0	45.9	46.0	46.0	46.0	47.9	(4.0)
Liquefied Gases	88.0	105.2	116.8	104.8	104.8	105.0	(0.2)
Other Products	52.1	50.6	43.5	45.9	45.9	43.9	4.6
Total Products	590.8	604.0	630.5	620.6	620.6	628.7	(1.3)
Unfinished Oils	112.5	109.5	109.7	107.8	107.8	107.5	(0.3)
Nat'l. Gas Liquids	10.8	11.8	11.8	11.6	11.6	11.5	(0.9)
Crude Oil	338.3	345.2	341.9	340.5	340.5	342.3	(0.5)
TOTAL INVENTORIES	1,062.4	1,070.3	1,093.9	1,080.5	1,080.5	1,090.0	(0.9)
[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	12,180	0.5

Source: Independent Petroleum Assn. of America, Supply and Demand Committee, November 19[illegible]4.

The Independent Petroleum Assn. of America, which has a pretty good track record for its forecasts, feels that 1985 will turn out pretty much like 1984 all over again.

Domestic product demand is expected to average around 15.9-million b/d in 1985, up only slightly over 1984. Continued conservation and a return to normal weather were expected to offset whatever gains might normally have come from the economy.

Motor gasoline demand in 1985 will probably remain flat compared to 1984, IPAA says. Fleet efficiency improvements will counter the increase in the number of miles that will be driven this year.

Middle distillate demand is estimated to rise only 1% to just over 3-million b/d. This bulk of this increase, however, is coming from transportation needs, not space-heating.

Residual fuel oil demand is expected to decline 1.5%, which should surprise no one.

Supply will be about the same as it was in 1984, IPAA says. Crude imports could rise to 260,000 b/d while product imports should drop by 50,000 b/d.

IPAA makes two forecasts per year, one in the fall and the other in the spring. The 1985 spring meeting was pushed back to the end of May this year, however, meaning that its spring update would be too late for the 1985 *Factbook*.

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U.S. Supply/Demand Projections—1984-2000

Conoco Inc.'s fifth annual long range forecast confirms anew that U.S. oil demand will continue to rise in the years ahead—but at a snail's pace, about one-half of one percent per year from 1984 through 2000.

Conoco says the slow growth will be largely attributable to continued declines in the consumption of gasoline, which accounts for about two-fifths of the U.S. oil demand.

The company's "World Energy Outlook Through 2000" anticipates that U.S. oil demand, which peaked at 19-million b/d in 1978 and fell to 15-million b/d in 1983, would rise to 16.5-million b/d in 1990 and 17-million b/d by the year 2000. The upward movement began in 1984.

Here are some other highlights of the Conoco projections:

- The average fuel efficiency of new autos is not expected to increase through 1990 because buyers are opting for larger, more powerful cars. Nevertheless, the average fuel efficiency of the total auto fleet will improve slowly as older, less-efficient cars are scrapped.
- Kerosine jet fuel demand will rise as increased air travel is only partially offset by improvements in aircraft fuel efficiency and load factors.
- Distillate consumption will grow slowly as freight transportation fuel use expands and other uses, including home heating, contract.
- Residual fuel oil consumption will expand slowly due to increased bunkering of maritime vessels and rising use for power generation.

Conoco says domestic supplies of crude oil will continue to decrease through the years ahead as the older and larger U.S. fields begin to give out. The decline will average 1% annually while imports rise from 4.5-million b/d in 1984 to 7.5-million b/d in 2000.

The outlook adds:

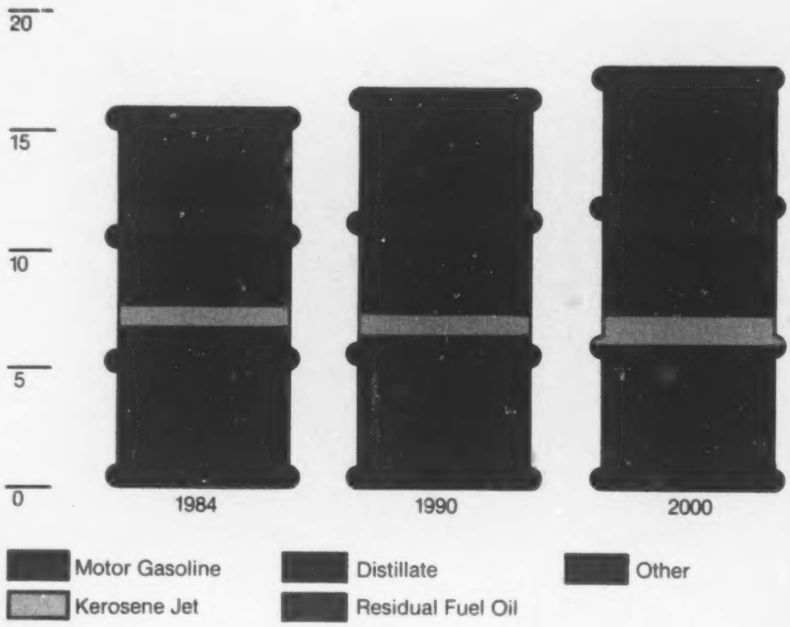
Even Alaskan production will decline in the 1990s as new developments fail to offset falling output from Prudhoe Bay. Increased production off the California coast, one of the hottest domestic exploration plays currently, will not be sufficient to offset the decrease in other Lower-48 crude production.

Synthetic liquids from coal and shale oil are not commercially viable given the crude price outlook, so they will contribute less than 100,000 b/d by 2000.

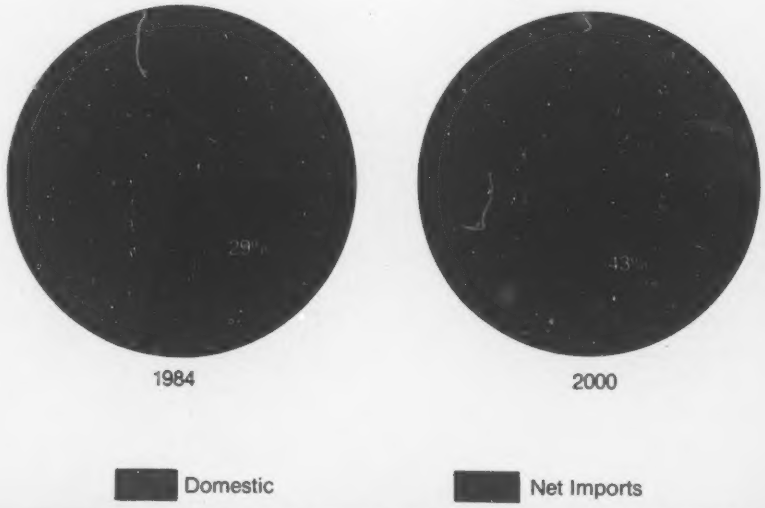
The end result of all this will be an increase in U.S. reliance on net imports from 29% of oil demand in 1984 to 43% in 2000. By the turn of the century, import dependence will have returned to the level that existed prior to the price shock induced by the Iranian Revolution.

U.S. Oil Demand

(Million Barrels Per Day)



Sources of U.S. Oil Supply



All-Time Total, Wells Drilled in U.S. (a)

	OIL		GAS		DRY		TOTAL
	Number	Percent	Number	Percent	Number	Percent	Number
PAD District 1							
Florida	255	27.9	4	0.4	656	71.7	915
Maryland	0	0	72	60.5	47	39.5	119
New York	9,051	66.7	3,503	22.7	1,007	7.4	13,565
Pennsylvania	247,306	79.2	26,555	8.5	38,435	12.3	312,337
Virginia	56	10.4	357	63.9	127	23.5	540
West Virginia	47,154	43.2	42,512	38.9	19,499	17.7	109,165
Total	**303,822**	**69.6**	**73,007**	**16.7**	**59,771**	**13.7**	**436,641**
PAD District 2							
Illinois	74,604	60.9	1,431	1.2	46,392	37.9	122,427
Indiana	37,268	59.2	2,097	3.3	23,604	37.5	62,969
Kansas	112,827	52.0	21,224	9.7	84,636	38.2	218,677
Kentucky	48,751	52.0	10,071	10.7	34,905	37.2	93,727
Michigan	13,342	39.9	2,613	7.8	17,512	52.3	33,467
Missouri	685	36.3	195	10.3	1,009	53.4	1,889
Nebraska	4,988	30.6	206	1.3	11,117	68.2	16,312
North Dakota	4,725	50.4	93	1.0	4,559	48.8	9,377
Ohio	69,905	45.8	46,436	30.5	36,143	23.7	152,484
Oklahoma	220,041	60.1	40,731	11.1	105,363	28.8	366,158
South Dakota	176	17.0	68	6.6	788	76.4	1,032
Tennessee	1,431	27.3	1,280	24.4	2,538	48.4	5,249
Total	**588,743**	**54.3**	**126,445**	**11.7**	**368,566**	**34.0**	**1,083,768**
PAD District 3							
Alabama	847	23.7	579	15.2	2,145	61.5	3,571
Arkansas	16,887	53.9	2,767	8.8	11,692	37.3	31,346
Louisiana	76,132	45.8	27,847	16.8	62,175	37.4	166,154
Mississippi	7,069	32.3	1,191	5.5	13,449	62.0	21,709
New Mexico	27,695	49.4	16,857	30.0	11,911	21.2	56,097
Texas	458,118	58.6	67,114	8.6	256,205	32.8	781,439
Total	**586,748**	**55.3**	**116,357**	**10.9**	**357,618**	**33.7**	**1,060,316**
PAD District 4							
Colorado	9,150	27.0	5,814	17.2	18,867	55.8	33,831
Montana	9,929	37.1	4,010	15.0	13,059	48.7	26,998
Utah	2,828	38.5	1,179	16.0	3,340	45.5	7,347
Wyoming	24,219	51.7	3,397	7.2	19,243	41.1	46,859
Total	**46,126**	**40.1**	**14,400**	**12.5**	**54,509**	**47.4**	**115,035**
PAD District 5							
Alaska	1,226	68.0	116	6.4	462	25.6	1,804
Arizona	53	11.2	35	7.4	384	81.4	472
California	100,233	77.7	3,015	2.3	25,745	20.0	128,993
Nevada	35	12.0	1	0.3	255	87.6	291
Oregon	0	0	11	3.8	281	96.2	292
Total	**101,547**	**77.0**	**3,178**	**2.4**	**27,127**	**20.6**	**131,852**
Atlantic Coast	0	0	0	0	30	100.0	30
Gulf of Mexico Northern	58	21.7	13	4.9	196	73.4	267
Pacific Coast	0	0	0	0	4	100.0	4
Total Federal Waters	**58**	**19.2**	**13**	**4.3**	**230**	**76.4**	**301**
Miscellaneous	3	0.5	0	0	554	99.5	557
TOTAL	**1,627,047**	**57.5**	**333,400**	**11.8**	**868,375**	**30.7**	**2,828,470**

(a) To Jan. 1, 1984; totals exclude service wells.
Source: Independent Petroleum Assn. of America, "The Oil Industry in Your State-1984."

Gasoline is Oil's Prime Product

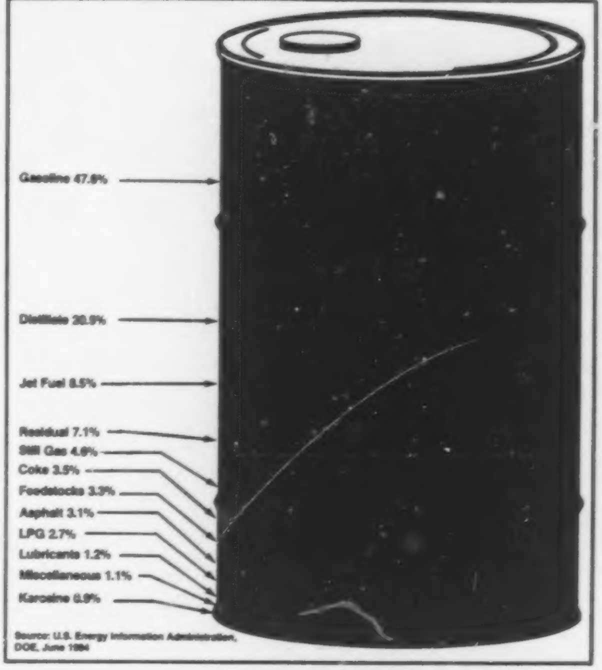
Distilled in hundreds of refineries, crude oil produces a variety of products, and gasoline is by far the most important. On the average, gasoline accounts for 47.6% of the crude oil barrel. Some sophisticated refineries, however, can easily exceed that average and produce even greater volumes of gasoline.

Here are the average yields for a standard 42-gal. bbl.:

Product	Gallons	Product	Gallons
Gasoline	19.9	Feedstocks	1.4
Distillate	8.6	Asphalt	1.3
Jet Fuel	3.6	LP-Gas	1.1
Residual	3.0	Lubricants	0.5
Still Gas	1.9	Kerosine	0.4
Coke	1.5	Miscellaneous	0.2

(These yields total 43.7 gal. mostly as a result of hydrogen processing gains. Similarly, in the chart at the right, the percentages include 4.1% processing gains.)

Legend has it that the 42-gal. bbl. dates back to the 15th century when King Edward IV of Norway standardized the herring barrel at 42 gal. Subsequently this became a standard for whiskey barrels in the U.S. The oil barrel was modeled after that in 1866 for all U.S. shipments. Canada uses an imperial gallon, which is larger than the U.S. variety, while most countries overseas use the metric system for weights and measures.



Source: U.S. Energy Information Administration, DOE, June 1984

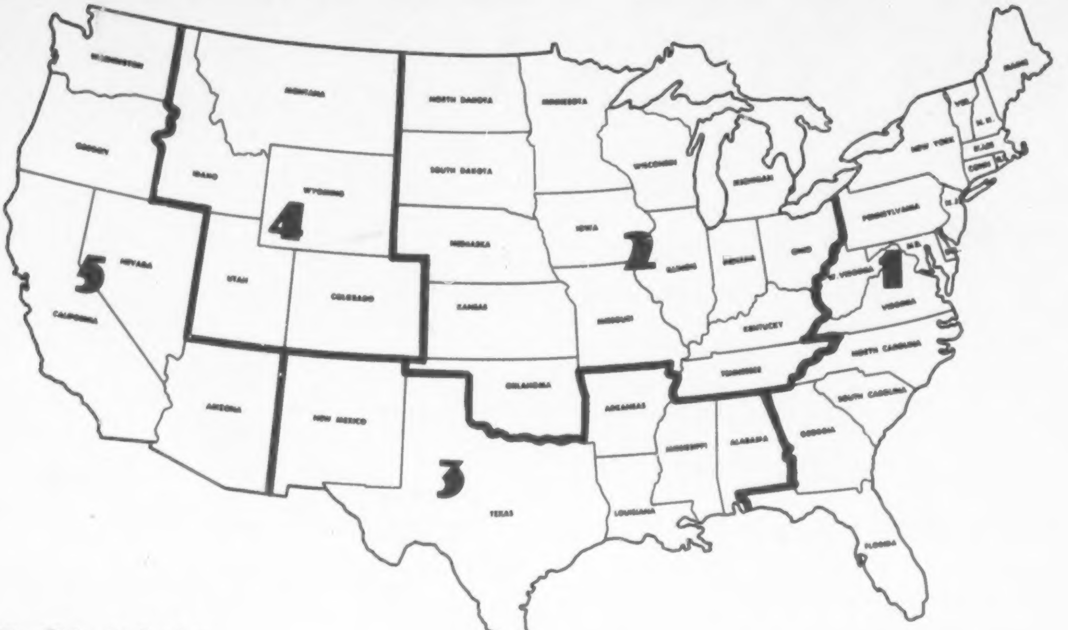
To understand much of what we're doing with respect to cancer research, you'd need a graduate degree in microbiology or biochemistry.

But to understand how well our educational programs and service resources help both patients and their families, simply talk to one out of every 100 Americans who are part of our volunteer program. Or talk to one of the 3 million who've survived cancer.

The battle isn't over but we are winning.

Please support the American Cancer Society.

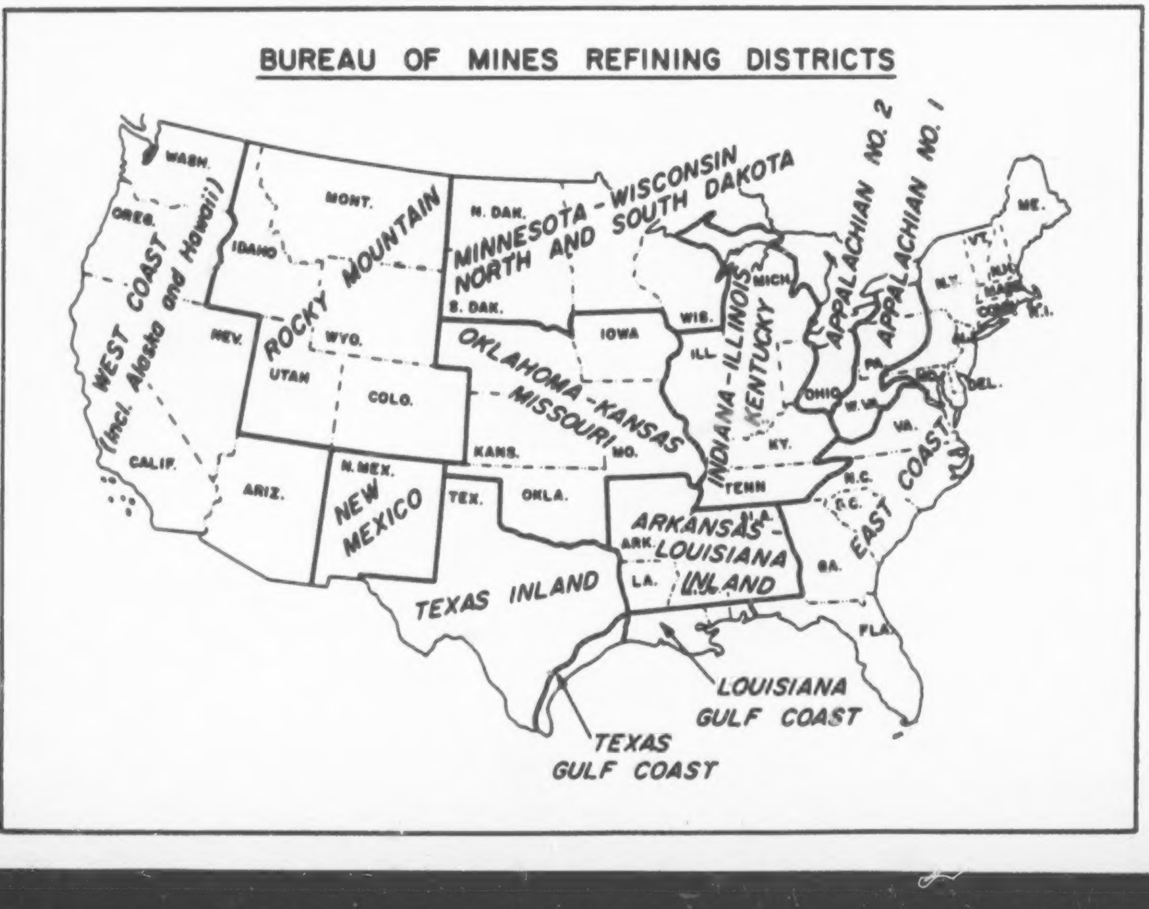
AMERICAN CANCER SOCIETY®



PAD Districts

PAD 1: Connecticut, Delaware, District of Columbia, Florida, Georgia, Maine, Maryland, Massachusetts, New Hampshire, New Jersey, New York, North Carolina, Pennsylvania, Rhode Island, South Carolina, Vermont, Virginia, and West Virginia; **PAD 2**: Illinois, Indiana, Iowa, Kansas, Kentucky, Michigan, Minnesota, Missouri, Nebraska, North Dakota, Ohio, Oklahoma, South Dakota, Tennessee, and Wisconsin; **PAD 3**: Alabama, Arkansas, Louisiana, Mississippi, New Mexico, and Texas; **PAD 4**: Colorado, Idaho, Montana, Utah, and Wyoming; **PAD 5**: Alaska, Arizona, California, Hawaii, Nevada, Oregon, and Washington.

Source: Energy Data Reports, Department of Energy.


BUREAU OF MINES REFINING DISTRICTS
WASH.
OREG.
WEST COAST (Incl. Alaska and Hawaii)
CALIF.
IDAHO
MONT.
ROCKY MOUNTAIN
NEV.
WYO.
UTAH
COLO.
ARIZ.
N. MEX.
NEW MEXICO
N. DAK.
MINNESOTA - WISCONSIN NORTH AND SOUTH DAKOTA
S. DAK.
OKLAHOMA - KANSAS - MISSOURI
IOWA
KANS.
MO.
TEX.
OKLA.
TEXAS INLAND
ARKANSAS - LOUISIANA INLAND
ARK.
LA.
ALA.
MISS.
WIS.
ILL.
INDIANA - ILLINOIS - KENTUCKY
MICH.
KY.
TENN.
OHIO
APPALACHIAN NO. 2
APPALACHIAN NO. 1
W.VA.
PA.
N.Y.
VT.
N.H.
ME.
MASS.
CONN.
R.I.
N.J.
DEL.
MD.
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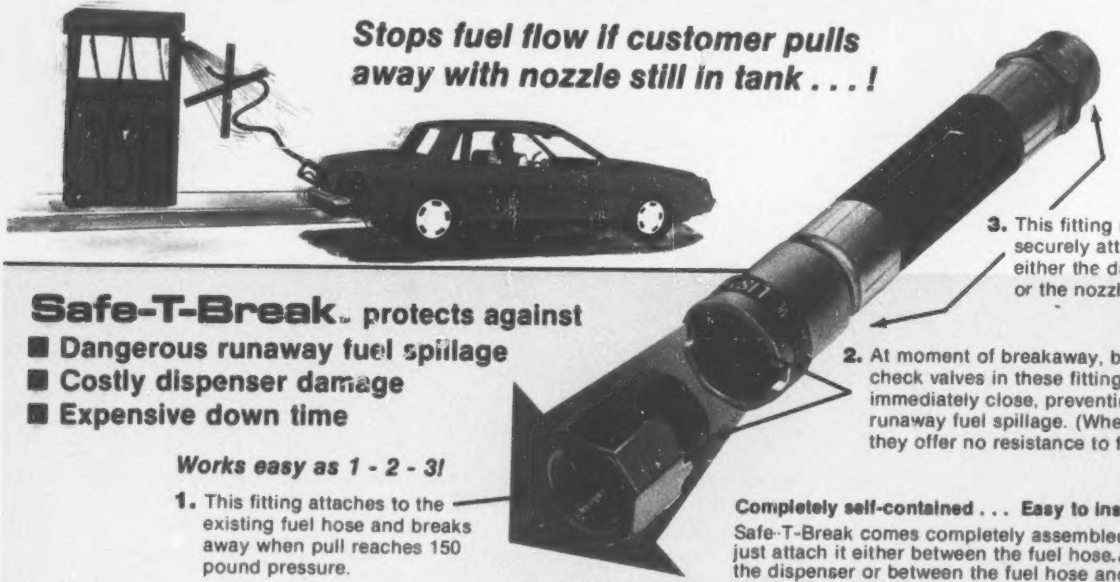
FLA.
EAST COAST
LOUISIANA GULF COAST
TEXAS GULF COAST

The "PROTECTORS" from HUSKY

Low cost insurance against dangerous, costly accidents

Protect yourself with Safe-T-Break™



Stops fuel flow if customer pulls away with nozzle still in tank . . . !

3. This fitting remains securely attached to either the dispenser or the nozzle swivel.

2. At moment of breakaway, butterfly check valves in these fittings immediately close, preventing runaway fuel spillage. (When open, they offer no resistance to fuel flow).

Safe-T-Break™ protects against

- Dangerous runaway fuel spillage
- Costly dispenser damage
- Expensive down time

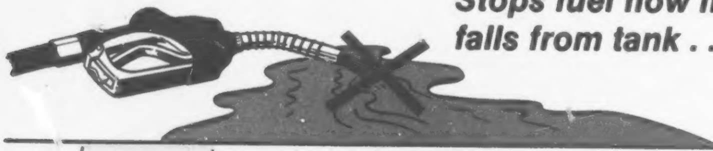
Works easy as 1 - 2 - 3!

1. This fitting attaches to the existing fuel hose and breaks away when pull reaches 150 pound pressure.

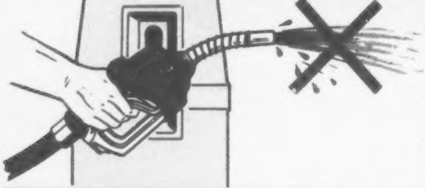
Patent Pending

Completely self-contained . . . Easy to install . . .
Safe-T-Break comes completely assembled . . . just attach it either between the fuel hose and the dispenser or between the fuel hose and the nozzle. Standard fittings make installation easy.

Protect yourself with FLO→STOP



Stops fuel flow if nozzle falls from tank . . . !



Stops fuel flow if customer squeezes lever when lifting nozzle out of pump boot . . . !

This simple safety device, built right in the spout tip, holds back fuel flow until nozzle is pointed down in dispensing position. Now included on all "Leader" nozzles at NO EXTRA COST!

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Primary Storage Capacity: No Need for Concern

The industry has more than enough primary storage capacity to take care of its needs and, in fact, has enough in reserve that it can expand to record-breaking proportions in a hurry if it has to. The most recent study by National Petroleum Council, completed in late 1983, shows that the total capacity actually shrank a little between 1978 and 1983 in the face of the declining consumption in the marketplaces. The same study indicated that the industry's minimum operating inventories also dropped noticeably over that same four-year period. Two-thirds of the decreases involved storage capacities for distillate and residual fuel oils.

The following tables give a thumbnail picture of the primary capacity system for crude and products:

Primary Storage Capacity —1978 and 1983

(millions of bbl.)

	3/31/78		3/31/83		
	Tankage In Operation	Under Construction	Tankage In Operation	Under Construction	Idle But Available
Crude oil	462	12	499	10	16*
Gasoline	464	5	456	3	7
Kerosine	86	1	21	1	1
Kero-Jet Fuel			68	—	3
Distillate	336	3	295	1	18*
Residual	156	1	143	4	13*
Total	1,504	22	1,482	19	58

*Includes some that requires environmental waivers to restore to operation.

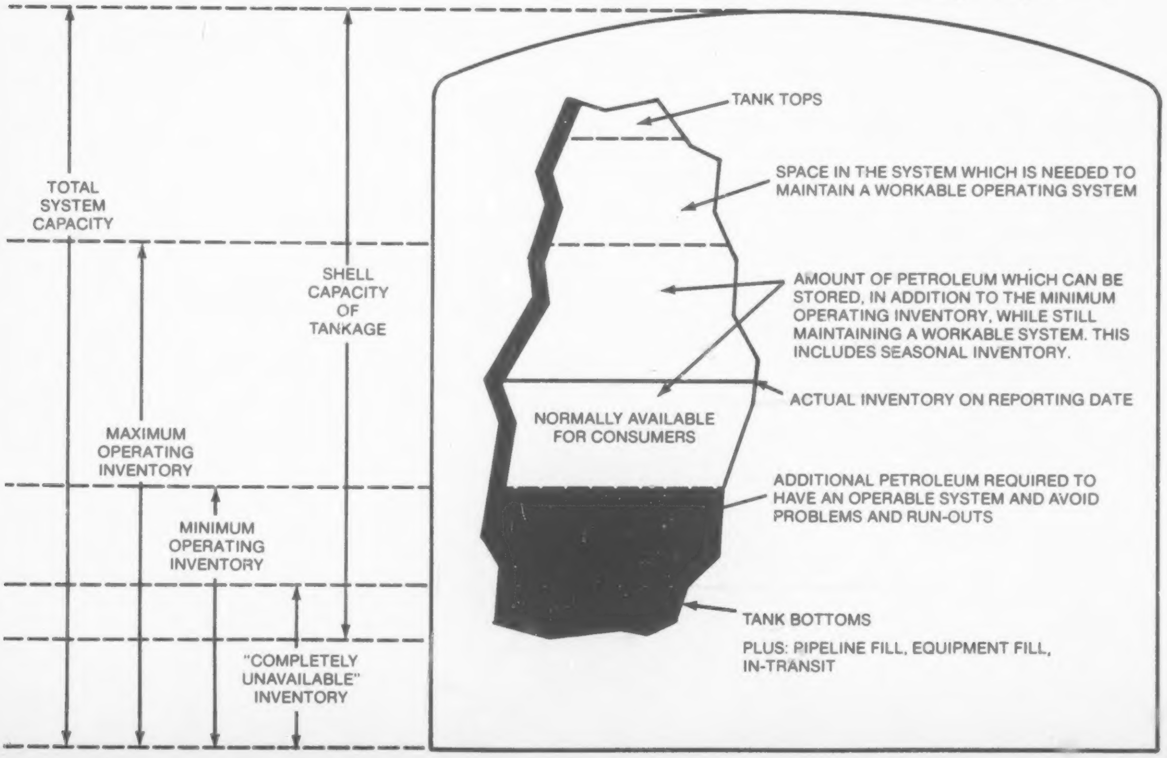
Primary Minimum Operating Inventories—1979 and 1983

(millions of bbl.)

	1979	1983			
	Total U.S.	PADs 1-4	PAD 5	Total U.S.	U.S. Decrease '83 vs '79
Crude oil	290	215	70	285	5
Gasoline	210	176	24	200	10
Kerosine	35	5	—	5	−5
Kero-Jet Fuel		20	5	25	
Distillate	125	97	8	105	20
Residual	60	34	6	40	20
Total	720	547	113	660	60

Source: (both tables) National Petroleum Council, Petroleum Inventories and Storage Capacity, November 1983.

Simplified Diagram of Terms Describing Petroleum Inventories and Storage Capacities


TANK TOPS
SPACE IN THE SYSTEM WHICH IS NEEDED TO MAINTAIN A WORKABLE OPERATING SYSTEM
TOTAL SYSTEM CAPACITY
SHELL CAPACITY OF TANKAGE
AMOUNT OF PETROLEUM WHICH CAN BE STORED, IN ADDITION TO THE MINIMUM OPERATING INVENTORY, WHILE STILL MAINTAINING A WORKABLE SYSTEM. THIS INCLUDES SEASONAL INVENTORY.
ACTUAL INVENTORY ON REPORTING DATE
NORMALLY AVAILABLE FOR CONSUMERS
MAXIMUM OPERATING INVENTORY
ADDITIONAL PETROLEUM REQUIRED TO HAVE AN OPERABLE SYSTEM AND AVOID PROBLEMS AND RUN-OUTS
MINIMUM OPERATING INVENTORY
TANK BOTTOMS
PLUS: PIPELINE FILL, EQUIPMENT FILL, IN-TRANSIT
"COMPLETELY UNAVAILABLE" INVENTORY

Estimated Storage Capacity and Inventory In the U.S. Petroleum Distribution System

(as of March 31, 1983)

(gal. for product, bbl. for crude oil; add 000,000 in both cases)

	Primary			Secondary			Tertiary			Total U.S.		
	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized	Capacity	Inventory	% Utilized
Gasoline	19,152	9,366	48.9%	4,242	1,470	34.7%	4,326	1,764	40.8%	27,720	12,642	45.6%
Kerosine	882	378	42.9	168	42	25.0	(a)	(a)	—	1,050	420	40.0
Kero-Jet fuel	2,856	1,470	51.5	—	—	—	882	462	52.4	3,738	1,932	51.7
Distillate	12,390	4,956	40.0	1,754	420	23.8	11,844	5,502	46.5	25,998	10,878	41.8
Residual	6,006	1,932	32.2	252	84	33.3	9,954	3,612	36.3	16,212	5,628	34.7
Total (b)	**41,286**	**18,102**	**43.8**	**6,426**	**2,016**	**31.4**	**27,006**	**11,340**	**41.9**	**74,718**	**31,440**	**42.0**
Crude oil (c)	499	313	62.7	—	—	—	—	—	—	499	313	62.7

(a) Included in distillate for tertiary storage segment; (b) Totals include surveyed products only. These inventory levels and utilization of storage represent satisfactory levels under normal operating conditions, according to the National Petroleum Council. Also, totals may not add up, due to independent rounding; (c) Excludes 31-million bbl. of Alaskan North Slope crude oil in transit.

Source: National Petroleum Council, Study of Petroleum Inventories and Storage Capacity, June 1984.

Secondary and Tertiary Storage Capacity

National Petroleum Council, at the request of the federal government, put together a series of calculations on the secondary and tertiary storage capacities of the domestic petroleum industry for the first time. These were published in the summer of 1984. It was the first time that petroleum has had more than rough estimates of its storage capabilities.

The Council defined the secondary distribution system as: **Bulk Plants**—storage facilities that have a total storage capacity of less than 50,000 bbl. and do not receive petroleum products by barge, ship or pipeline; **Retail Motor Fuel Outlets**—service stations, truck stops, etc. It defined **Tertiary Storage Capacity** as the end users—the utilities, agricultural, commercial, residential, transportation, etc.

Here are its findings:

Estimated Storage Capacity and Inventory in the Secondary Distribution System on 3/31/1983

	(millions of gal.) Storage Capacity	Inventory
Motor gasoline	4,242	1,470
Kerosine	169	42
Diesel/distillate fuel oil	1,764	420
Residual fuel oil	252	84
Total*	**6,426**	**2,016**

*Totals include survey products only.

NPC, for the purposes of this study, estimated there were approximately 18,000 companies owning or operating bulk plants in the U.S. on March 31, 1983. It cited these specifics:

Estimated Storage Capacity and Inventory at Bulk Plants as of 3/31/83

	(millions of gal.) Storage Capacity	Inventory
Motor Gasoline	924	378
Kerosine	168	42
Diesel/distillate fuel oil	1,554	336
Residual Fuel oil	252	84
Total*	**2,898**	**840**

*Totals include products surveyed only.

Data from several sources was analyzed to determine the number of retail motor fuel outlets as well as their storage capacity and inventories. It was determined that as of March 31, 1983, there were approximately 210,000 retail outlets in the U.S. with an estimated storage capacity of 16,800 gal. and an average inventory of 5,600 gal. The total storage capacity at retail outlets, as of March 31, 1983, was estimated to have been 3,528,000,000 gal., with inventories about 1,176,000,000 gal. This is the breakout:

Estimated Storage Capacity and Inventory at Motor Fuel Outlets as of 3/31/83

	(millions of gal.) Storage Capacity	Inventory
Motor Gasoline	3,318	1,092
Diesel/distillate fuel oil	210	84
Total*	**3,528**	**1,176**

*Totals include surveyed products only.

For purposes of the NPC study, the tertiary storage segment was divided into seven sectors, as follows:

Estimated Storage Capacity and Inventory in the Tertiary Storage Segment as of 3/31/83

	(millions of gal.) Storage Capacity	Inventory
By Sector		
Agricultural	1,722	588
Commercial	1,554	336
Electric utilities	8,946	3,822
Industrial	2,562	714
Military/Government	2,352	966
Residential	4,200	2,310
Transportation	5,628	2,562
Total of Sectors*	**26,964**	**11,298**
By Product		
Motor Gasoline	4,326	1,764
Kerosine, diesel and distillates	11,844	5,502
Kero-Jet fuel	882	462
Residual fuel oil	9,954	3,612
Totals*	**27,006**	**11,340**

*Totals included surveyed products only; totals may not add due to independent rounding.

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You're too busy to spend time worrying about leaks underneath your service stations. So let the Mallory FD102 Pollulert® Fluid Detection System do it for you.

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But you won't constantly be pestered by false alarms. Pollulert is specially designed to tell the difference between a normal presence and when a leak occurs.

You can monitor multiple locations at each site with Pollulert—the system can be equipped with up to 10 individual probes.

To find out more about the "leak insurance" you need, write us. We'll send you the free booklet, Fluid Leak Detection: The Only Solution. Fill out the coupon and drop it in the mail immediately. Or call (317) 856-3857

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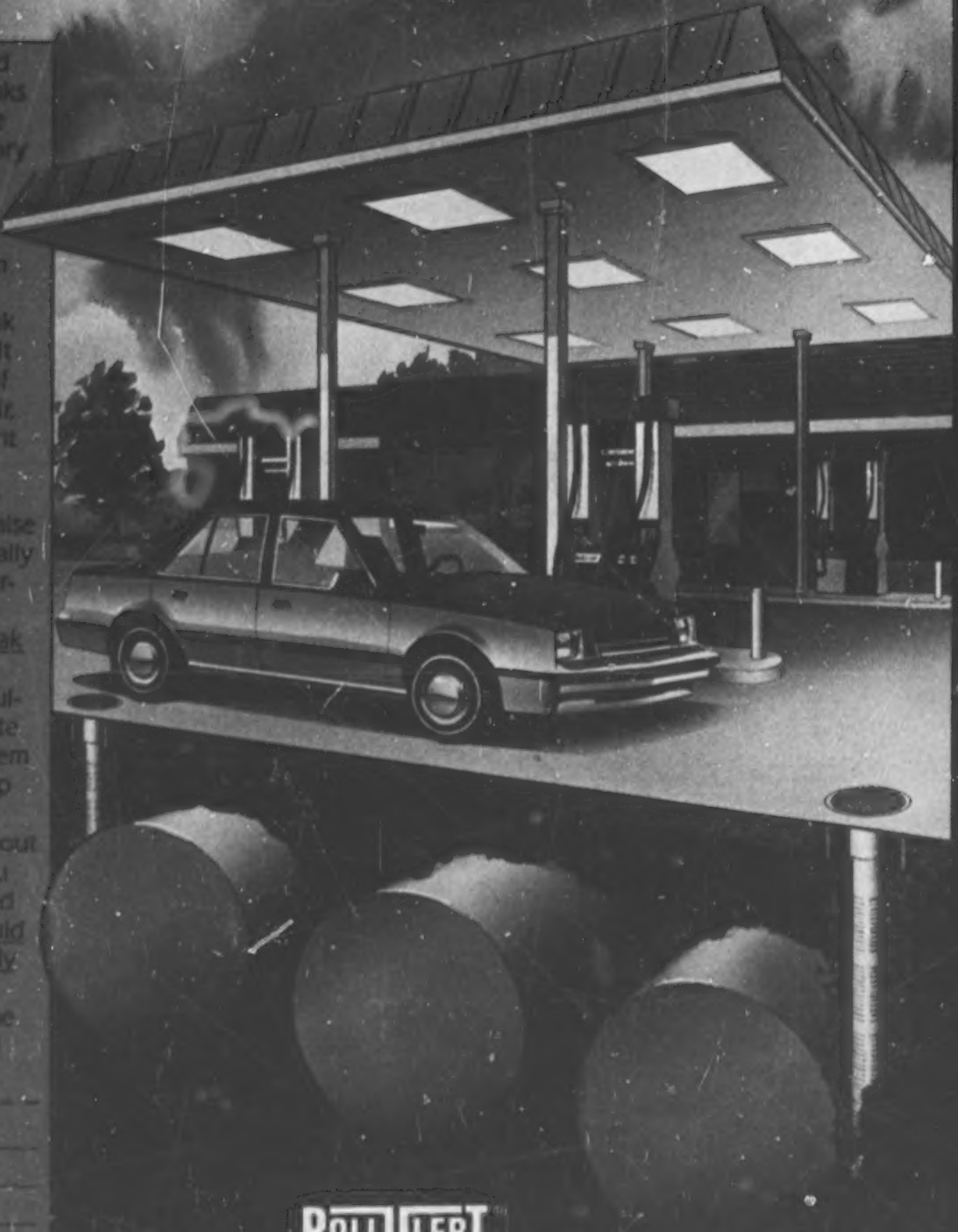

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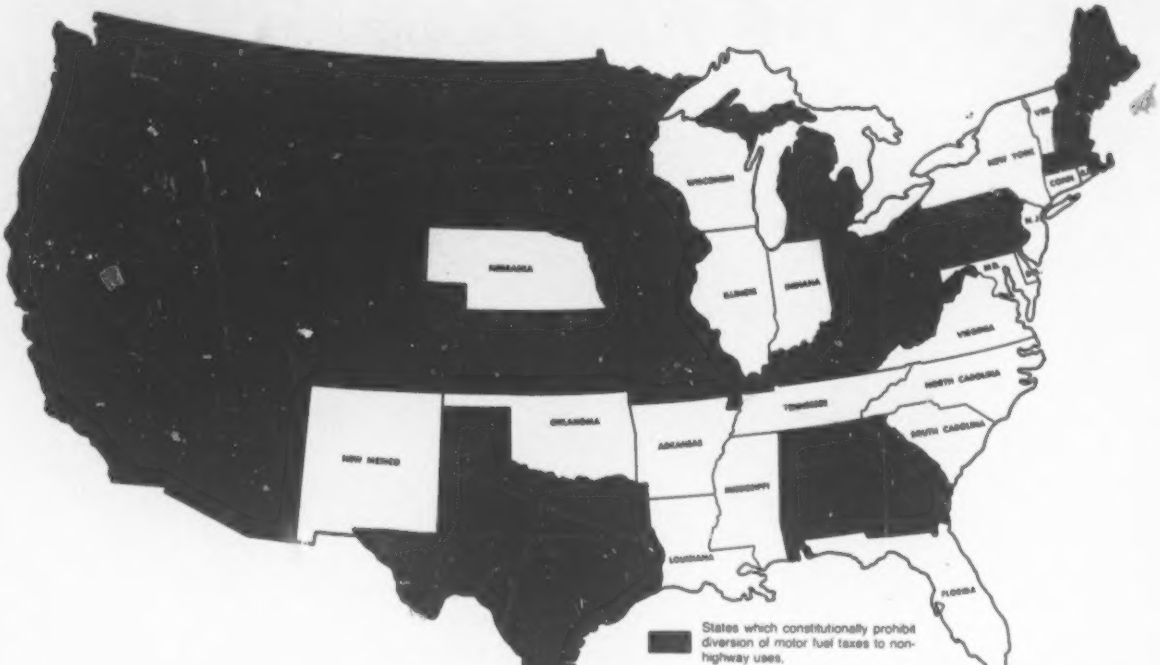

■ States which constitutionally prohibit diversion of motor fuel taxes to non-highway uses.

☐ States which have no such provisions.

State Tax Collections

State	Gasoline tax rates per gal. in 1984	Total state motor fuel tax revenues (Add 000) 1984	1983	% Change
Alabama	13¢	$265,537	$251,031	5.8%
Alaska	8	27,574	24,280	13.6
Arizona	13	261,699	169,722	54.2
Arkansas	9.5	140,899	128,501	9.6
California	9	1,152,597	1,115,850	3.3
Colorado	12	199,720	167,453	19.3
Connecticut	15	205,403	193,182	6.3
Delaware	11	28,055	36,380	4.6
Dist. of Columbia	15.5*	26,808	24,277	10.4
Florida	9.7*	588,591	494,671	19.0
Georgia	7.5	282,907	259,952	9.1
Hawaii	8.5	29,608	27,435	7.9
Idaho	14.5	74,233	69,496	6.8
Illinois	12	566,679	433,037	30.9
Indiana	11.1*	352,278	331,124	6.4
Iowa	13	210,213	184,689	13.8
Kansas	11	147,257	122,893	19.8
Kentucky	10*	203,321	196,251	3.6
Louisiana	16	308,272	196,312	57.0
Maine	14	91,357	71,699	27.4
Maryland	13.5*	306,429	267,982	14.3
Massachusetts	11*	281,223	264,628	6.3
Michigan	15*	617,402	488,770	26.3
Minnesota	17	391,317	303,221	29.1
Mississippi	9	143,710	126,584	13.1
Missouri	7	206,503	195,305	5.7
Montana	15	91,253	61,083	49.4
Nebraska	14.7*	144,277	116,120	24.2
Nevada	12	70,620	66,331	6.5
New Hampshire	14	70,211	61,951	13.3
New Jersey	8	310,077	298,798	3.8
New Mexico	11*	102,128	93,116	9.7
New York	8	434,430	422,386	2.9
North Carolina	12.25	433,385	390,378	11.0
North Dakota	13	56,168	43,229	29.9
Ohio	12*	651,231	595,200	9.4
Oklahoma	9	201,316	132,220	52.2
Oregon	9	116,698	97,814	19.3
Pennsylvania	12	913,214	746,307	22.4
Rhode Island	13*	54,599	46,509	17.3
South Carolina	13	248,874	232,575	7.0
South Dakota	13	56,351	52,162	8.0
Tennessee	10	294,910	278,418	5.9
Texas	10	779,637	503,443	54.9
Utah	14	167,834	81,559	32.2
Vermont	13	38,260	36,480	7.6
Virginia	13.63*	440,276	399,287	10.3
Washington	18	359,276	285,610	26.0
West Virginia	15.35*	99,073	99,709	(0.2)
Wisconsin	16	356,263	307,494	17.1
Wyoming	8	40,110	34,973	14.7
Total		$13,590,056	$11,627,177	16.9%

Note: Gasoline taxes are for gasoline only. *Variable tax expressed in average ¢ per gal. Total revenues include other receipts; 1984 data are estimates.
Source: Federal Highway Administration, Table SS83-2, October 1984.

Federal (Add 000)

Year	Gasoline(a)	Diesel and special fuels(a)	Lube oil(b)	Total
1984(c)	$8,774,821	$1,630,228	($10,156)	$10,394,893
1983	6,091,841	957,988	8,847	7,058,676
1982	4,120,013	594,083	76,181	4,790,277
1981	3,801,795	570,477	74,695	4,446,967
1980	4,019,481	518,352	78,835	4,616,668
1979	4,282,919	508,595	82,335	4,873,849
1978	4,381,950	488,064	79,047	4,949,061
1977	4,229,721	452,631	78,830	4,761,182
1976	4,140,924	408,560	70,135	4,619,619
1975	3,884,483	362,675	66,124	4,313,282
1974	3,854,505	373,302	78,155	4,305,962
1973	3,958,682	358,120	86,266	4,403,068
1972	3,736,545	321,551	85,841	4,143,937
1971	3,513,927	275,159	67,130	3,856,216
1970	3,408,505	264,815	65,862	3,739,182

(a) Taxes went up from 4¢ gal. to 9¢ gal. on April 1, 1984. Totals exclude mass transit account taxes which went into effect April 1, 1983. Mass transit account taxes amounted to $519.6-million in 1983, and $1.2-billion in 1984.
(b) Lube oil tax of 4¢ gal. was discontinued in 1983 and 1984 deficit represents paybacks.
(c) Figures for 1984 are fiscal year gross collections that went to the Highway Trust Fund, since net IRS calendar year information was not available. All other figures represent calendar year net collections after refunds and include the taxes the federal government pays on its own purchases.
Source: U.S. Department of Transportation, Federal Highway Administration.

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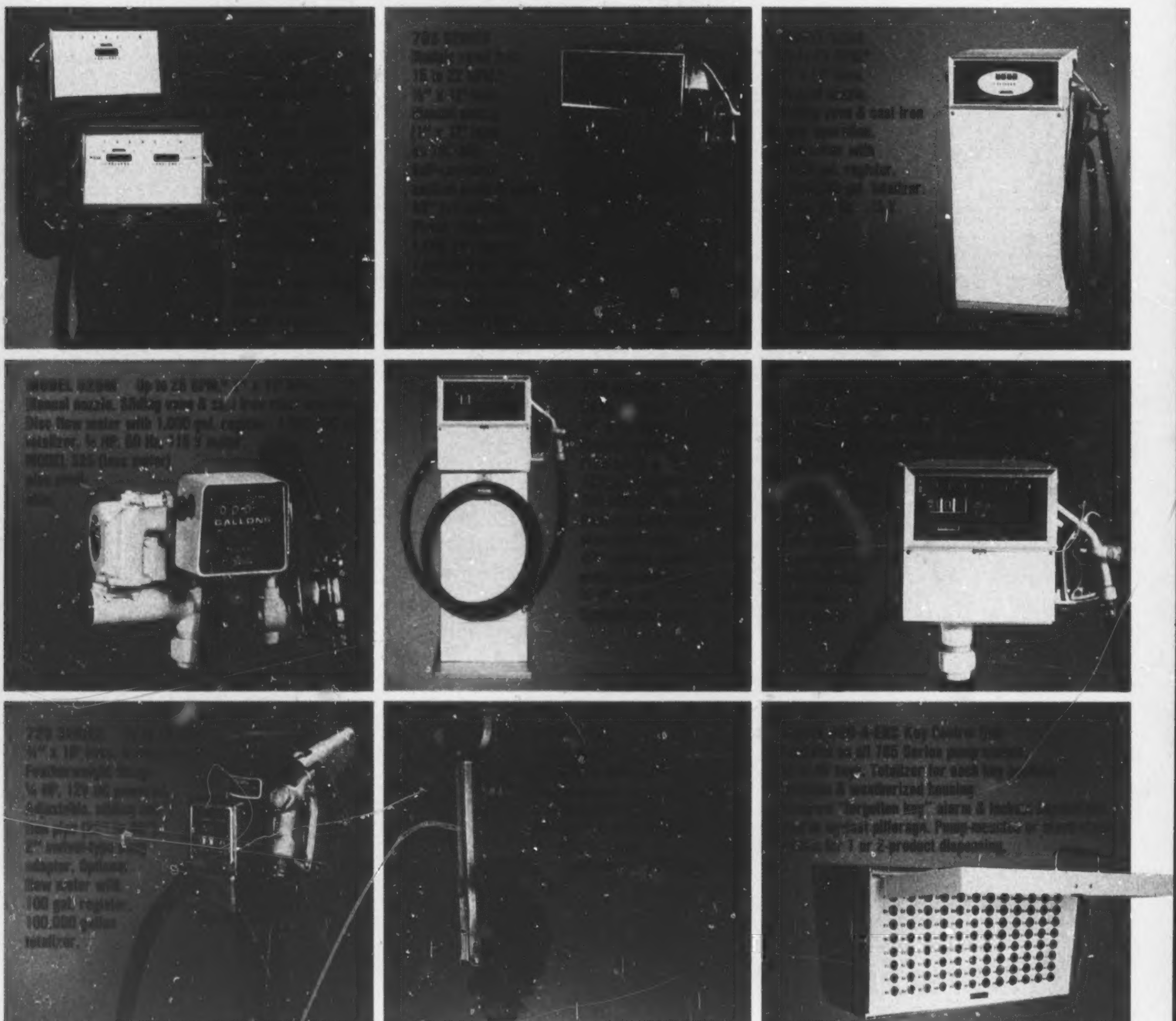

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Outlook for Tires and Batteries at Stations

Year	Replacement passenger tire shipments			Replacement automotive-type battery shipments		
	Total (in millions)	Station sales (a) (in millions)	Average per station (a)	Total (in millions)	Station sales (a) (in millions)	Average per station (a)
1984	145	29.0	220	59.3	17.8	135
1983	134	26.8	196	56.1	16.8	123
1982	132	26.4	182	54.2	16.3	113
1981	126	25.2	166	53.6	16.1	106
1980	107	21.4	135	50.0	15.0	95
1979	122	24.4	148	53.7	16.1	102
1978	135	27.0	157	56.3	16.9	102
1977	130	26.0	148	54.6	16.4	95
1976	123	24.6	132	49.2	14.8	84
1975	125	23.7	125	42.6	12.7	67
1974	124	24.8	127	44.4	13.3	68
1973	142	28.4	130	43.5	13.1	60
1970	130	26.0	118	37.9	11.4	51

(a) Estimates based on service stations holding 20% of the tire replacement market, and 30% of the replacement battery market;
Source: Tire and battery totals from Rubber Manufacturers Assn. and Battery Council International and estimates by *NPN*.

Battery Shipments Improve in 1984

Battery shipments (replacement and original equipment), rose 5% in 1984, topping the 70-million unit mark for the first time in history. Replacements amounted to 59.3-million units, up 5.8% over the preceding year. Original equipment requirements approached the 11-million mark as the automotive industry continued to gain ground. The difference wasn't much; nevertheless it was on the positive side for the second consecutive year.

(Add 000)

Year	Replacements	% of Market	New cars & trucks	% of Market	Total market	% Change from previous year
1984	59,333	84.5	10,925	15.5%	70,258	5.0%
1983	56,105	83.8	10,823	16.2	66,928	7.9
1982	54,214	87.4	7,819	12.6	62,033	0.8
1981	53,598	87.1	7,956	12.9	61,554	6.0
1980	50,063	86.2	8,009	13.8	58,072	−11.0
1979	53,746	82.4	11,480	17.6	66,226	−6.2
1978	56,389	81.4	12,910	18.6	62,299	3.0
1977	54,601	81.2	12,639	18.8	67,240	10.8
1976	49,202	81.0	11,477	19.0	60,679	17.6
1975	42,582	82.5	8,985	17.6	51,567	−5.3
1973	43,453	77.5	12,637	22.5	56,090	2.9
1970	37,389	81.9	8,239	18.1	45,629	0.5

Source: Replacement battery figures supplied by Battery Council International. New cars and trucks are U.S. factory sales figures provided by Motor Vehicle Manufacturers Assn.

Replacement Batteries

Replacement battery shipments totaled 59.3-million units in 1984, with 12-volt and 6-volt accounting for 89% of the total, according to Battery Council International. Here are the highlights of its annual report:

Replacement Batteries:

Passenger cars and light trucks:

12-volt: 47,354,534, or 79.8% of the total; 6-volt: 1,234,012, or 2.1% of the total.

Heavy duty commercial:

12-volt: 2,757,626, or 4.6% of the total; 6-volt: 1,775,217, or 3.0% of the total.

Original Equipment:

Passenger cars and light trucks:

12-volt: 10,936,003, or 85.6% of the total; 6-volt: 12,283, or 0.01% of the total.

Heavy duty commercial:

12-volt: 838,211, or 6.6% of the total; 6-volt: 52,458, or 0.04% of the total.

Source: Battery Council International, April 1985.

Where Batteries Are Sold

Shipments in Units

Channels of Distribution	1984			1983		
	Private Brands	Mfg. Own Brand	Total	Private Brands	Mfg. Own Brand	Total
Gasoline and Oil	1,920,647	265,700	2,186,347	1,932,053	224,242	2,156,295
Tires and Rubber	2,167,830	362,062	2,529,892	2,371,630	289,244	2,660,874
Department and Discount Stores	12,735,498	363,609	13,099,107	12,629,457	71,069	12,700,526
Auto Chains and Others	6,600,478	891,614	7,492,122	5,957,735	546,615	6,504,350
Fleet Operations	9,629	377,091	386,720	8,121	336,053	344,174
Vehicle & Equipment Mfrs.	2,159,402	285,706	2,445,108	2,014,058	336,519	2,350,577
Parts Distribution	4,243,318	6,609,980	10,853,298	4,020,836	5,312,637	9,333,473
Battery Specialists	13,527,685	4,619,082	18,146,767	13,273,978	4,419,869	17,693,847
Others (a)	552,759	436,720	989,479	467,441	577,019	1,044,460
Total	**43,917,246**	**14,211,594**	**58,128,840**	**42,675,309**	**12,113,267**	**54,788,576**

(a) Includes government data.
Source: Battery Council International; figures based on estimates submitted by 20 member firms.

Tire Shipments Rise Again in 1984

Tire shipments blossomed anew in 1984, rising for the second consecutive year. Original equipment shipments were up 16.3%, a healthy increase in their own right but not quite as hefty, however, as 1982's upward bounce of 28.6%.

Total shipments of all types of tires were up 10.8% in 1983. This can only be considered good news for an industry that has been in the doldrums in recent years.

'84 vs. '83	Passenger(a)	Bus/ Truck	Farm Equipment	Total by Type of Market
Original Equipment	16.3%	40.9%	0.9%	18.7%
Replacement	7.9	4.6	18.3	7.5
Export	44.2	29.4	34.8	41.1
Total by Type	**10.8%**	**10.8%**	**14.1%**	**10.8%**

(a) RMA dropped motorcycle tires in 1984 because of inadequacy of data.
Source: *NPN*, based on Rubber Manufacturers Assn. Monthly Statistical Report.

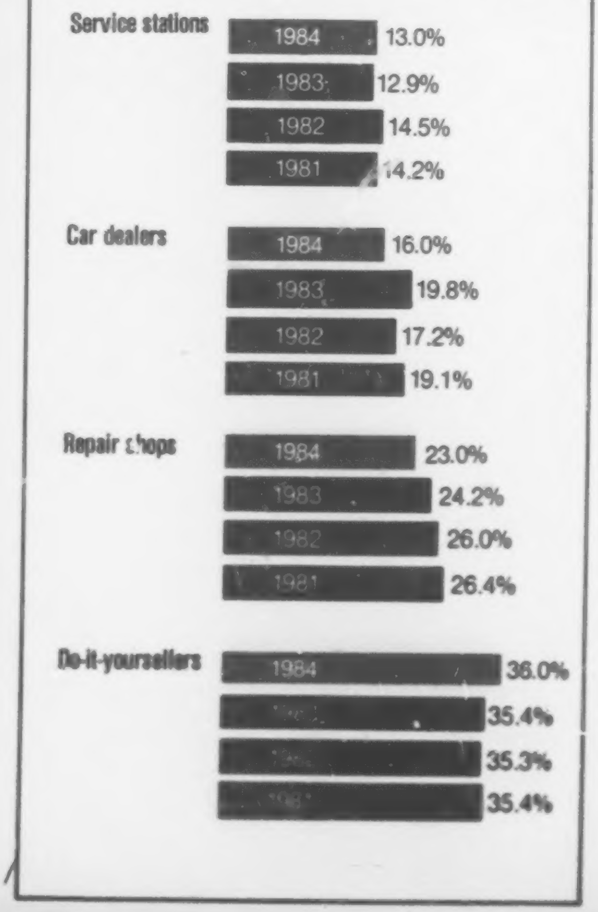
Auto, Truck and Farm Shipments

Type of Tire
(Add 000)

	Passenger (a)	% of Market	Bus/ Truck	% of Market	Farm Equipment	% of Market	Total of Market Type	% of Total
1984								
Original Equipment	50,993	85.4%	7,777	13.0%	920	1.5%	59,690	24.2%
Replacement	144,580	80.8	31,707	17.7	2,592	1.4	178,879	72.7
Export	6,064	80.0	1,333	17.6	162	2.4	7,579	3.1
Total	**201,637**	**81.9%**	**40,817**	**16.6%**	**3,694**	**1.5%**	**246,148**	**—%**
1983								
Original Equipment	43,845	87.2%	5,519	11.0%	912	1.8%	50,276	22.6%
Replacement	133,964	80.5	30,301	18.2	2,191	1.3	166,456	74.9
Export	4,206	78.3	1,030	19.2	135	2.5	5,371	2.4
Total	**182,015**	**82.0%**	**36,850**	**16.6%**	**3,238**	**1.5%**	**222,103**	**—%**

(a) RMA dropped motorcycle tires in 1984 because of inadequacy of data.
Source: Rubber Manufacturers Assn., Monthly Statistical Report.

Where consumers get tuneups



1984 Ethylene Glycol-Base Antifreeze Sales

	(Add 000 gal.) Civilian	Government
Packaged ethylene glycol antifreeze sold in		
quart and gallon sizes	131,078,230	-0-
in drums	13,638,307	(*)
Total	**144,716,537**	**(*)**
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to packagers	52,721,827	(*)
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to motor vehicle manufacturers for "drive-away" or factory fill use	17,307,727	
Total	**214,746,091**	**4,291,961**
Grand total (civ. and gov't.)		**219,038,052**

1983 Ethylene Glycol-Base Antifreeze Sales

	(Add 000 gal.) Civilian	Government
Packaged ethylene glycol		
antifreeze in quarts	204,890	-0-
in gallons	133,303,749	-0-
in drums	12,314,181	-0-
Total	**145,822,820**	-0-
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to packagers	59,688,409	-0-
Bulk ethylene glycol antifreeze (or ethylene glycol for antifreeze) sold to motor vehicle manufacturers for "drive-away" or factory fill use	16,761,344	-0-
Grand total	**222,272,573**	(*)

(*) Data not shown, except for total, to avoid disclosure of individual company data.
Source: Chemical Specialties Manufacturers Assn.

Outlook Brightens for Parts and Services

After the lackluster performances of recent years, the automotive parts and services business is beginning to look up again, according to the Bureau of Industrial Economics of the U.S. Department of Commerce.

The Bureau projects almost heady growth for 1985 in the number of establishments, total sales and average sales per unit. In a revised set of figures, it now appears that 1983 was the bottoming-out year.

At that, however, the 1985 forecast of 38,034 establishments is far below the peak year of 1977 when the franchised industry total was around 48,700.

The growth in 1984 over 1983 was an almost insignificant 0.6%. But between 1984 and 1985, the growth rate was much better, a healthy 3.4%. By way of contrast, the 48,700 establishments in peak year 1977 aggregated only $6.5-billion in sales versus 1985's projection of $10.6-billion for 10,000 fewer stores.

Automotive Products/Services (a)

	1985 (b)	1984 (b)	1983
Total number of establishments	38,034	36,772	36,541
Company-owned	4,421	4,259	4,268
Franchise-owned	33,613	32,513	32,278
Total sales of products and services (Add $000) (c)	10,603,878	9,561,054	8,724,942
Company-owned (c)	3,473,818	3,126,499	2,894,465
Franchise-owned (c)	7,130,060	6,434,560	5,830,477
Average sales per establishment (c)	$279,000	$260,000	$239,000
Company-owned (c)	786,000	734,000	678,000
Franchise-owned (c)	212,000	198,000	180,000

(a) Includes tire, battery and accessory stores; auto and truck wash services; and brake and muffler repair and service; (b) Data estimated by respondents; (c) Includes sales of non-automotive products such as household appliances, garden supplies, etc.
Source: "Franchising in the Economy, 1983-1985," Bureau of Industrial Economics, U.S. Department of Commerce, February 1985.

Passenger Car Lubrication Service

1985 Crankcase Drain Intervals and Recommended Oil

		Normal Service		Severe Service		
Make	Engine	Miles	Months	Miles	Months	Type Of Oil
American Motors	All	7,500	7.5	—	—	SF
Chrysler Corp.	Turbo	7,500	6	3,000	3	SF-CC SF-CD(a)
	Others	7,500	12	3,000	3	SF
Ford Motor Co.	Turbo	5,000	—	3,000	3	SF SF-CC SF-CD
	2.0 L Diesel	7,500	7.5	3,000	3	SF-CC SF-CD
	2.4 L Diesel	5,000	—	3,000	3	SF-CD
	Others	7,500	12	3,000	3	SF SF-CC SF-CD
General Motors	Gasoline	7,500(b)	12	3,000(b)	3	SF SF-CC SF-CD
	4-cyl. Diesel	3,750	12	2,000	3	SF-CC SF-CD
	6&8-cyl. Diesel	5,000	12	2,500	3	SF-CC SF-CD

(a) preferred
(b) 4-cyl. turbo, 3,000 miles or 3 months.
Source: Gousha/Chek-Chart.

1985 Automatic Transmission/Transaxle Drain Intervals and Recommended Fluids

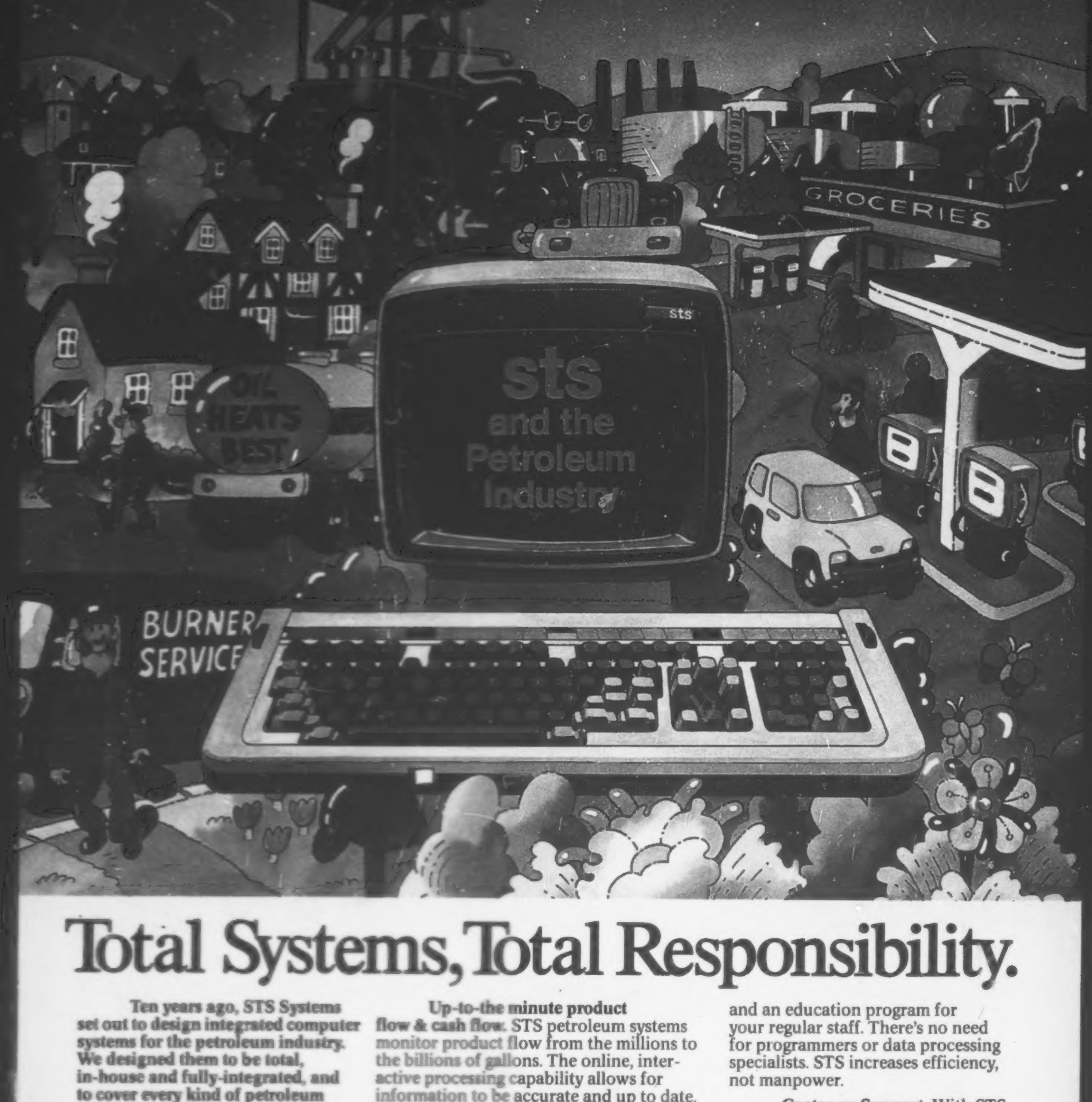
		Normal Service		Severe Service	
Make	Fluid	Months	Miles	Months	Miles
American Motors	Dexron®-II	30	30,000	—	—
Chrysler Corp.	Dexron®-II	—	(a)	—	15,000
Ford Motor Co.	Dexron®-II (b)	—	(a)/	—	30,000
General Motors	Dexron®-II	—	100,000	—	15,000

(a) Drain not required for normal service.
(b) C-5 trans. uses type H Fluid.
Source: Gousha/Chek-Chart.

1985 Chassis Lubrication Intervals

	Normal Service		Severe Service			
Make	Months	Miles	Months	Miles	Type	Part or Specification No.
American Motors	7.5	7,500(a)	Shorter - intervals		#2 Lithium EP	8993630
Chrysler Corp.	36	30,000	18	15,000	#2 Barium EP	4318062
Ford Motor Co.	—	30,000	—	15,000	#2 Lithium EP with polyethylene & molybdenum disulfide (suspension)	
					#4-5 Lithium (steering)	M1C75-B M1C92-A Type II
General Motors						
Gasoline	12	7,500	6	6,000	#1-2 Multipurpose EP	6031-M
Diesel	12	5,000	6	5,000	#1-2 Multipurpose EP	6031-M

(a) Except front-wheel drive models.
Source: Gousha/Chek-Chart. Reprinted with permission.



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Exclusive 1984 Service Job Analysis: Fewer Stations, But More Money Made

There are fewer service stations doing repair work these days, but, as has been the story since 1972, they are garnering a bigger share of the $75.8-billion auto service market.

According to Hunter Publishing Company's exclusive 1984 *Service Job Analysis*, the total number of stations performing repair and service dropped a bit from 120,000 in 1981 to 115,000 in 1984, but the average dollar volume soared from $108,700 per outlet to $164,500 in 1984—a 51% increase.

In fact, all three types of auto repair outlets—service stations, independent repair shops, and new car/truck outlets—showed increases in dollar volume, with the entire service market ringing up $75.8-billion—a 41% hike over 1981's $53.9-billion.

The table below presents data selected from the SJA's major repair/service categories. It shows totals by individual market segments, along with the percentage of jobs performed by each segment.

The data is based on a service dealer universe of 329,000 outlets: 115,000 service stations, 150,000 independent repair shops, 25,000 new car/truck dealers, and 39,000 fleet service locations. The fleet service segment has been left out of the tables because it pertains more to truck repair than automobile service. The SJA does not include figures for discount stores, auto repair chains or other non-traditional repair outlets.

		Service Stations		Independent Repair Shops		New Car/Truck Dealers	
Job	Total Jobs* Performed (Add 000)	Number of Jobs Performed (Add 000)	% of Jobs	Number of Jobs Performed (Add 000)	% of Jobs	Number of Jobs Performed (Add 000)	% of Jobs
LUBRICATION							
Lube Jobs—Car	139,316	68,591	49.2%	34,301	24.6%	28,072	20.1%
Oil Changes—Car	148,122	71,944	48.6	36,043	24.3	32,692	22.1
Engine Oil Sold—Quarts	838,941	417,871	49.8	204,434	24.4	146,077	17.4
Oil Filters Replaced—Car	126,848	63,115	49.8	33,936	26.8	28,060	22.1
Air Filters Replaced	55,267	24,709	44.7	19,338	35.0	10,279	18.6
CARBURETOR/FUEL PUMP							
Carburetors Installed	1,553	529	34.1	785	50.5	134	8.6
Fuel Pumps Installed	5,582	2,358	42.2	2,208	39.6	700	12.6
Fuel Filters Replaced	42,313	15,962	37.7	17,383	41.1	8,220	19.4
Fuel Injection Serviced	2,469	303	12.3	1,007	40.8	1,123	45.5
IGNITION/TUNE-UP							
Engine Tune-Ups—Car	58,422	19,949	34.1	25,902	44.3	11,162	19.1
Spark Plugs—New	322,310	112,680	35.0	144,814	44.9	56,147	17.4
ELECTRICAL SERVICE							
Batteries Sold	27,098	14,447	53.3	8,796	32.5	2,266	8.4
Batteries Recharged	47,784	28,478	59.6	12,976	27.2	4,021	8.4
Battery Cables Sold	15,909	7,117	44.7	6,483	40.8	1,266	8.0
Starters Installed	1,807	652	36.1	791	43.8	268	14.8
Voltage Regulator Installed	6,597	2,609	39.5	2,889	43.8	746	11.3
Sealed Beam Headlights Sold	27,497	15,504	54.7	8,478	30.8	2,583	9.4
COOLING SYSTEM							
Systems Flushed	13,576	6,307	46.5	5,020	37.0	1,747	12.9
Radiators Repaired In-Shop	5,512	1,942	35.2	2,634	47.8	617	11.2
Radiators Replaced	4,453	1,887	42.4	2,115	47.5	343	7.7
Radiator Hose Replaced	25,865	12,514	48.4	10,153	39.3	2,234	8.6
Belts Installed—All Types	52,087	24,503	47.0	19,683	37.8	5,650	10.8
Water Pumps Replaced	6,533	2,211	33.8	2,999	45.9	1,067	16.3
Antifreeze Sold—Gal	78,930	36,472	46.2	26,257	33.3	9,954	12.6

		Service Stations		Independent Repair Shops		New Car/Truck Dealers	
Job	Total Jobs* Performed (Add 000)	Number of Jobs Performed (Add 000)	% of Jobs	Number of Jobs Performed (Add 000)	% of Jobs	Number of Jobs Performed (Add 000)	% of Jobs
EXHAUST SYSTEM							
Mufflers Replaced	13,793	5,917	42.9	5,704	41.4	1,948	14.1
Tail Pipes Replaced	12,520	5,446	43.5	5,218	41.7	1,391	11.1
Exhaust Pipes Replaced	6,653	2,776	41.7	2,751	41.3	757	11.4
Catalytic Converters Replaced	1,215	234	19.3	272	22.4	666	54.8
TRANSMISSION/CLUTCH							
Standard Transmissions Overhauled	1,291	94	7.3	568	44.0	481	37.3
Automatic Transmissions Overhauled	2,665	238	8.9	1,031	38.7	1,294	48.6
Automatic Transmission Fluid—Quarts	102,081	41,499	40.7	36,830	36.1	18,581	18.2
Universal Joints Replaced	11,485	4,931	42.9	5,431	47.3	888	7.7
Clutches Replaced	1,569	340	21.7	742	47.3	440	28.0
ALIGNMENT/SUSPENSION							
Wheels Balanced—Static/Dynamic	30,661	16,249	53.0	9,817	32.0	3,178	10.4
Wheels Balanced—Computer	38,662	19,917	51.5	13,139	34.0	5,149	13.3
Front-End Alignment	22,216	5,216	23.5	11,236	50.6	5,410	24.4
Shock Absorbers Replaced	25,509	10,270	40.3	12,212	47.9	2,151	8.4
MacPherson Strut Cartridges Replaced	4,064	948	23.3	2,415	59.4	626	15.4
BRAKES							
Drum Brake Shoes Installed	24,837	9,685	39.0	11,608	46.7	3,135	12.6
Master Cylinder Replaced	4,473	1,475	33.0	2,454	54.9	400	8.9
Brake Drums Replaced	2,965	1,074	36.2	1,443	48.7	337	11.4
Brake Drums Turned/Grnd	27,217	9,213	33.9	13,697	50.3	3,487	12.8
Disc Brake Pads Replaced	31,360	11,855	37.8	14,494	46.2	4,567	14.6
Disc Brake Rotors Resurf.	30,747	9,819	31.9	16,723	54.4	3,725	12.1
Disc Brake Rotors Replaced	4,765	1,740	36.5	2,237	46.9	655	13.7
TIRE SERVICE							
Tires Sold—Car	41,277	26,140	63.3	12,282	29.8	2,132	5.2
Tires Mounted—Car	64,688	45,029	69.6	15,579	24.1	2,599	4.0
Tires Repaired	72,779	59,405	81.6	9,737	13.4	890	1.2
CHEMICALS							
Engine Oil Additive	13,029	6,977	53.5	3,244	24.9	2,495	19.1
Gasoline Additive	17,363	11,103	63.9	4,363	25.1	1,501	8.6
Transmission Additive	4,452	2,016	45.3	1,749	39.3	638	14.3
ACCESSORIES							
Windshield Wiper Refills	38,861	22,210	57.2	11,044	28.4	4,045	10.4
Windshield Wiper Blades Replaced	14,748	7,456	50.6	4,251	28.8	1,716	11.6
Air Conditioners Serviced	17,848	7,336	41.1	6,239	35.0	3,869	21.7
MISCELLANEOUS							
Road Service Calls	24,231	14,915	61.6	6,773	28.0	830	3.4
Towing	18,399	8,075	43.9	6,719	36.5	3,186	17.3

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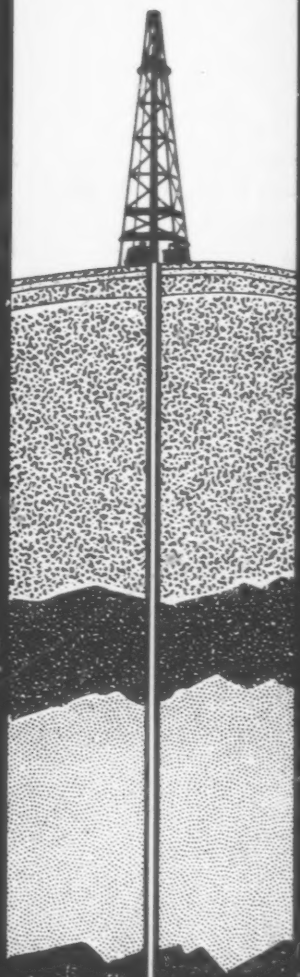
*Segment figures and percentages will not add up to total—remainder is accounted for by self-service fleet locations.

Discovering oil is still uncertain.

Discovering its price is not.



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NYMEX Energy Futures:
The Free-Market Price

U.S. Refineries and Capacities by States

(Crude Oil Operable Capacity on Jan. 1, 1984)

(* after number indicates capacity shut down but capable of being placed in operation within 90 days.)

Company	b/d
Alabama: Gulf	
Louisiana Land & Exploration Co., Mobile	41,300
	38,700*
Mobile Bay Refining Co., Chickasaw	26,600*
Total	**41,300**
	38,700*
Alabama: Inland	
Hunt Oil Co., Tuscaloosa	33,500
Vulcan Refining Co., Tuscaloosa	9,500*
Warrior Asphalt Co. of Alabama, Holt	4,000
	1,500*
Total	**37,500**
	11,000*
Alaska	
Atlantic Richfield Co., North Slope	20,000
Chevron U.S.A., Kenai	22,000
Mapco Petroleum Co., (Formerly North Pole Refining Co.) North Pole	45,000
Tesoro Petroleum Corp., Kenai	48,500
Total	**135,500**
Arkansas	
Cross Oil & Refining Co., Smackover	6,700
	2,700*
Crystal Oil Co., Stephens	3,200
MacMillan Petroleum, Inc., Norphlet	4,600
	1,280*
Tosco Corp., El Dorado	38,500
	8,500*
Total	**53,000**
	12,480*
California	
Anchor Refining Co., McKittrick	9,000*
Atlantic Richfield Co., Carson	188,000
	27,000*
Beacon Oil Co., Hanford	17,300
Champlin Petroleum Co., Wilmington	60,000
Chevron U.S.A., Bakersfield	26,000
El Segundo	390,000
	15,000*
Richmond	294,000
	71,000*
Coastal Petroleum, Inc., Paloma	10,000
Conoco, Santa Maria	9,500
Demenno-Kerdoon, Compton	10,000
ECO Petroleum, Long Beach	0
Edgington Oil Co., Long Beach	22,800
	18,720*
Exxon Co. U.S.A., Benicia	109,000
Fletcher Oil & Refining Co., Carson	29,500
Getty Refining & Marketing Co., Bakersfield	38,000
	10,400*
Golden Eagle Refining Co., Carson	16,170
Golden West Refining Co., (Formerly Gulf Oil Corp.) Santa Fe Springs	42,000
Huntway Refining Co. of Northern California, Van Nuys	6,750
Huntway Refining Co., Wilmington	4,750
Independent Valley Energy Co., Bakersfield	27,000
Kern Oil & Refinery Co., Bakersfield	21,400
Lunday-Thagard Oil Co., South Gate	3,700
MacMillan Petroleum, Inc., Long Beach	11,000
Marlex Oil & Refining, Long Beach	21,100
Mobil Oil Corp., Torrance	123,500
Newhall Refining Co. Inc., Newhall	21,400
Oxnard Refinery, Oxnard	4,000
Pacific Oasis Corp., Paramount	32,000
	14,500*
Pacific Refining Co., Hercules	56,000
Powerine Oil Co., Santa Fe Springs	44,120
San Joaquin Refining Co., Bakersfield	10,000
	14,300*
Shell Oil Co., Martinez	91,400
Wilmington	93,000
Sunland Refining Corp., Bakersfield	12,000
Texaco Inc., Wilmington	75,000
Tosco Corp., Avon	126,000
Bakersfield	38,800
Union Oil Co. of California, Arroyo Grande	41,000
Rodeo	70,000
Wilmington	86,500
	21,500*
U.S.A. Petrochem Corp., Ventura	24,000
West Coast Oil Co., Oildale	19,000*
Witco Chemical Corp., Oildale	0
Total	**2,257,720**
	266,320*
Colorado	
Asamera Oil (U.S.), Commerce City	26,000
Conoco, Commerce City	32,500
Gary Western Co., Fruita	13,100
Total	**71,600**
Delaware	
Getty Refining & Marketing Co., Delaware City	140,000
Georgia	
Amoco Oil Co., Savannah	24,000
Young Refining Corp., Douglasville	4,500
Total	**28,500**
Hawaii	
Chevron U.S.A., Honolulu	48,000
Illinois	
Clark Oil & Refining Corp., Blue Island	57,000
Hartford	47,500
Marathon Oil Co., Robinson	120,000
	75,000*
Mobil Oil Corp., Joliet	180,000
Moreco Energy, McCook	1,000
Shell Oil Co., Wood River	250,000
Texaco, Lawrenceville	54,000
	30,000*
Union Oil Co. of California, Lemont	151,000
Total	**860,500**
	105,000*
Indiana	
Amoco Oil Co., Whiting	376,000
Gladieux Refinery, Fort Wayne	19,000
Indiana Farm Bureau Cooperative Assn., Mount Vernon	21,200
Kentucky Oil & Refining Co., Troy	1,000*
Laketon Refining Corp., Laketon	7,900
Rock Island Refining Corp., Indianapolis	43,200
Total	**467,300**
	1,000*
Kansas	
Derby Refining Co., North Wichita	27,982
Farmland Industries, Coffeyville	56,500
Phillipsburg	26,400
Getty Refining & Marketing Co., El Dorado	80,577
National Cooperative Refinery Assn., McPherson	54,000
Pester Refining Co., El Dorado	33,250
Total Petroleum, Arkansas City	42,500
Total	**322,027**
	0*
Kentucky	
Ashland Oil, Catlettsburg	213,400
Louisville	25,200*
B-T Energy Corp., Louisville	3,000
Kentucky Oil & Refining Co., Betsy Lane	600*
Somerset Refinery Inc., Somerset	5,500
Total	**221,900**
	25,800*
Louisiana: Gulf	
Canal Refining Co., Church Point	8,000
Celeron Oil & Gas Co., Mermentau	11,000*
Citgo Petroleum Corp., Lake Charles	297,000
	23,000*
Clark Oil & Refining Corp., Mt. Airy	0
Conoco, Egan	1,500
	5,000*
West Lake	156,500
CPI Oil & Refining, Lake Charles	9,500
	4,000*
Exxon Co. U.S.A., Baton Rouge	455,000
Gulf Oil Corp., Belle Chasse	198,500
Hill Petroleum Co., Krotz Springs	46,000
	11,400*
International Processors, St. Rose	28,356*
Marathon Oil Co., Garyville	255,000
Murphy Oil U.S.A., Meraux	78,000
Placid Refining Co., Port Allen	45,000
Shell Oil Co., Norco	218,200
Tenneco Oil Co., Chalmette	114,000
Texaco, Convent	140,000

Company	b/d
Texas NAPCO, St. James (Formerly LaJet Inc.)	20,000
Total	**2,022,090**
	114,956*
Louisiana: Inland	
Atlas Processing Co., Shreveport	45,000
	31,500*
Calumet Refining Co., Princeton	3,200
	1,200*
Claiborne Gasoline Co., Lisbon	6,500
Kerr-McGee Corp., Cotton Valley	7,800
Dubach	10,000
Port Petroleum Inc., Stonewall	3,200*
Total	**72,500**
	36,900*
Maryland	
Chevron U.S.A., Baltimore	14,200*
Michigan	
Crystal Refining Co., Carson City	3,000
Lakeside Refining Co., Kalamazoo	5,600
Marathon Oil Co., Detroit	68,500
Total Petroleum, Alma	40,000
Total	**117,100**
	0*
Minnesota	
Ashland Oil, St. Paul Park	67,143
Koch Refining Co., Rosemount	137,000
Total	**204,143**
	0*
Mississippi: Gulf	
Chevron U.S.A., Pascagoula	295,000
Mississippi: Inland	
Amerada Hess Corp., Purvis	30,000
Ergon Refining, Vicksburg	20,600*
Southland Oil Co., Lumberton	5,800
Sandersville	11,000
Vicksburg Refining, Vicksburg	7,900*
Total	**46,800**
	28,500*
Montana	
Cenex, Laurel	33,650
	7,800*
Conoco, Billings	48,500
Exxon Co. U.S.A., Billings	42,000
Flying J, Cutbank	5,600*
Kenco Refining, Wolf Point	4,700
Simmons Refining Corp., Great Falls	6,300
Total	**136,150**
	13,400*
Nevada	
Nevada Refining Co., Tonopah	4,500
New Jersey	
Chevron U.S.A., Perth Amboy	80,000
	88,000*
Exxon Co. U.S.A., Linden	100,000
Mobil Oil Corp., Paulsboro	100,000
Seaview Petroleum Co., Paulsboro	44,400
Texaco Inc., Westville	90,000
Total	**414,400**
	88,000*
New Mexico	
Caribou-Four Corners, Farmington	2,200*
Giant Industries Inc., Gallop	18,000
Navajo Refining Co., Artesia	29,930
Plateau, Bloomfield	16,800
Southern Union Refining Co., Lovington	36,100
Thriftway Oil Co., Bloomfield	6,100
Total	**106,830**
	2,200*
New York: East	
Cibro Petroleum Products, Albany	41,850
New York: West	
Ashland Oil, Buffalo	64,000*
North Carolina	
GNC Energy Corp., Greensboro	3,000*
North Dakota	
Amoco Oil Co., Mandan	56,000
Flying J, Williston	1,830
	2,750*
Total	**57,830**
	2,750*
Ohio: East	
Ashland Oil, Canton	66,000
Ohio: West	
Ashland Oil, Findlay	20,400*
Gulf Oil Corp., Cleves	43,700
Standard Oil Co. of Ohio, Lima	168,000
Toledo	120,000
Sun Co., Toledo	118,000
Total	449,700
	60,400*
Oklahoma	
Allied Materials Corp., Stroud	7,600
Conoco, Ponca City	134,000
Kerr-McGee Corp., Wynnewood	43,000
Oklahoma Refining Co., Cyril	12,750
Thomas	8,800
	2,800*
Sinclair Oil Corp., (Formerly Texaco, Inc.) West Tulsa	50,000
Sun Co., Tulsa	85,000
Tonkawa Refining Co., Arnett	12,000
Tosca Corp., Duncan	47,000*
Total Petroleum, Ardmore	62,000
Total	**415,150**
	49,800*
Oregon	
Chevron U.S.A., Willbridge	15,000
Pennsylvania: East	
Atlantic Richfield Co., Philadelphia	125,000
BP Oil Corp., Marcus Hook	168,000
Gulf Oil Corp., Philadelphia	174,100
Sun Co., Marcus Hook	155,000
Total	**622,100**
	0*
Pennsylvania: West	
American Refining Group, Indianola	200*
Ashland Oil, Freedom	6,800
Coral Petrolem Inc., (Formerly United Refining Co.) Warren	60,000
Pennzoil Co., Rouseville	15,700
Quaker State Oil Refining Corp., Smethport	6,700
Witco Chemical Corp., Bradford	6,841
Total	**86,041**
	200*
Tennessee	
Mapco Petroleum Co., (Formerly Delta Refining Co.) Memphis	60,000
Texas: Gulf	
American Petrofina Co. of Texas, Port Arthur	90,000
Amoco Oil Co., Texas City	415,000
Atlantic Richfield Co., Houston	232,000
Champlin Petroleum Co., Corpus Christi	155,000
	15,000*
Charter International Oil Co., Houston	65,000
Coastal States Petroleum Co., Corpus Christi	87,500
Conoco, Alvin/Texas City	33,274
Crown Central Petroleum Corp., Pasadena	100,000
Eddy Refining Co., Houston	3,250
Exxon Co. U.S.A., Baytown	494,000
Gulf Oil Corp., Port Arthur	406,000
Koch Refining Co., Corpus Christi,	105,000
Marathon Oil Co., Texas City	49,000
	20,500*
Mid-Gulf Energy Co., (Formerly Uni Refining Co.) Ingleside	39,400*
Mobil Oil Corp., Beaumont	275,000
Petromax, Houston	2,000*
Phillips Petroleum Co., Sweeney	175,000
Quintana Petrochemical Co., Corpus Christi	33,300
Saber Refining Co., Corpus Christi	0
Shell Oil Co., Deer Park	250,000
South Hampton Refining Co., Silsbee	18,100*
Southwestern Refining Co., Corpus Christi	63,000
	41,000*
Texaco, Port Arthur	341,000
	61,000*
Port Neches	31,000
Texas City Refining, Texas City	119,600
Union Oil Co. of California, Beaumont (Nederland)	22,000
	98,000*
Total	**3,515,824**
	326,000*
Texas: Inland	
Amber Refining, Fort Worth	20,000*
American Petrofina Co. of Texas, Big Spring	60,000
Chevron U.S.A., El Paso	76,000
Diamond Refining & Marketing Co., Sunray	73,300
Dorchester Refining Co., Mount Pleasant	26,500
White Deer	0
Flint Chemical Co., San Antonio	1,500
Howell Corp., San Antonio	9,900
La Gloria Oil & Gas Co., Tyler	46,000
Liquid Energy Corp., Bridgeport	10,000*
Petrolite Corp., Kilgore	1,000
Phillips Petroleum Co., Borger	95,000
Pride Refining Inc., Abilene	42,750
Shell Oil Co., Odessa	30,600
Sigmor Corp., Three Rivers	43,500
Tesoro Petroleum Corp., Carrizo Springs	26,100
Texaco, Amarillo	20,000
El Paso	17,000
Tropicana Energy Co., (Formerly TARCO) Euless	4,650*
Total	**569,150**
	34,650*

Company	b/d
Utah	
Amoco Oil Co., Salt Lake City	40,000
Caribou-Four Corners Oil Co., Woods Cross	8,400*
Chevron U.S.A., Salt Lake City	45,000
Crysen Corp., Woods Cross	12,500
Husky Oil Co., North Salt Lake	25,000
Morrison Petroleum Co., Woods Cross	6,000*
Phillips Petroleum Co., Woods Cross	20,000
Plateau, Roosevelt	7,500
Total	**155,000** **14,400***
Virginia	
Amoco Oil Co., Yorktown	53,000
Washington	
Atlantic Richfield Co., Ferndale	136,000
Chevron U.S.A., Richmond Beach	5,500
Mobil Oil Corp., Ferndale	71,500
Shell Oil Co., Anacortes	72,000
Sound Refining, Tacoma	11,900

Company	b/d
Texaco, Anacortes	78,000
U.S. Oil & Refining Co., Tacoma	25,000
Total	**398,900**
West Virginia	
Quaker State Oil Refining Corp., Newell	9,515
St. Mary's	4,650
Total	**14,165** **0***
Wisconsin	
Murphy Oil Corp., Superior	39,000
Wyoming	
Amoco Oil Co., Casper	48,000
Husky Oil Co., Cheyenne	28,800
Little America Refining Co., Casper	24,500
Mountaineer Refining Co., La Barge	200*
Sinclair Oil Corp., Sinclair	53,000
Wyoming Refining Co., Newcastle	12,555
Total	**166,855** **200***

Company	b/d
Guam	
Guam Oil & Refining Co., Agana	43,900
Puerto Rico	
Gulf Oil Corp., Bayamon	26,000 10,000*
Phillips Puerto Rico Core, Guayama	0
Sun Co., Yabucoa	85,000
Total	**111,000** **10,000***
Hawaiian Foreign Trade Zone	
Hawaiian Independent Refinery, Ewa Beach	60,000
Virgin Islands	
Amerada Hess Corp., St. Croix	515,000

Source: Petroleum Supply Annual, 1984, Energy Information Administration.

Lubricating Oil and Wax Capacities of U.S. Refineries

(All capacities in 000 b/d in 1984)

			Finished Lube Capacity					Wax Capacity	
Company	Location	Crude Capacity	A	B	C	D	Total	E	F
Allied Materials Corp.	Stroud, Okla.	8.0	0.8				0.8		0.2
Amoco Oil Co.	Casper, Wyo.	48.0	1.5		0.1		1.6	0.2	0.2
Amoco Oil Co.	Whiting, Ind.	376.0	6.2				6.2	0.6	
Ashland Oil, Inc.	Catlettsburg, Ky.	220.0	7.9				7.9		2.0
Ashland Oil, Inc.	Freedom, Pa.	6.5							
Atlantic Richfield Co	Houston, Tex.	232.0	4.4			2.0	6.4	0.4	0.4
Calumet Refining Co.	Burnham, Ill.	0.0				0.6	0.6		
Calumet Refining Co.	Princeton, La.	4.4				3.2	3.2		
Chevron U.S.A. Inc.	Richmond, Calif.	365.0	3.0	2.3			5.3	1.2	1.0
Cit-Con Oil Corp.	Lake Charles, La.		10.0				10.0	1.0	0.8
Conoco Inc.	Ponca City, Okla.	134.0	2.0				2.0	0.2	
Cross Oil & Refining, Inc.	Smackover, Ark.	9.8				4.0	4.0		
Diamond Shamrock Corp.	Three Rivers, Tex.	2.0				2.0	2.0		
Exxon Co., U.S.A	Baton Rouge, La.	455.0	13.8		2.7		16.5	1.5	
Exxon Co., U.S.A	Baytown, Tex.	494.0	16.1	9.0		6.7	31.8		1.7
Farmland Industries, Inc.	Coffeyville, Kans.	56.5	2.5				2.5	0.2	
Gulf Refining and Marketing Co.	Port Arthur, Tex.	412.7	6.6	0.5	1.4	1.6	10.1		0.4
Lubrication Co. of America	Saugus, Calif.			0.5			0.5		
Macmillan Petroleum, Inc.	Norphlet, Ark.	6.0				2.2	2.2		
Mobil Oil Corp.	Beaumont, Tex.	325.0	9.2				9.2	1.3	0.3
Mobil Oil Corp.	Paulsboro, N.J.	99.7	7.1				7.1		0.3
Pennzoil Co.	Falling Rock, W. Va.	0.0			0.0		0.0	0.0	0.0
Pennzoil Co.	Rouseville, Pa.	15.7			4.4		4.4	0.6	0.4
Pennzoil Co., Atlas Processing Co.	Shreveport, La.	76.5	3.6		1.4	2.7	7.7	1.0	
Petrolite Corp.	Barnsdall, Okla.							0.4	
Petrolite Corp., Bareco Div.	Kilgore, Tex.	1.0							0.3
Phillips Petroleum Co.	Kansas City, Kans.	0.0	0.0				0.0		0.0
Quaker State Oil Ref. Corp.	Emlenton, Pa.							0.7	
Quaker State Oil Ref. Corp.	Farmers Valley, Pa.	6.5	2.5				2.5	0.4	0.5
Quaker State Ref. Corp.	Newell, W. Va.	11.7			3.6		3.6		0.8
Quaker State Oil Ref. Corp.	St. Mary's, W. Va.	4.9	1.6				1.6		0.3
Shell Oil Co.	Deer Park, Tex.	285.0	4.5			4.4	8.9	1.2	
Shell Oil Co.	Martinez, Calif.	91.4		3.5		0.3	3.8		
Shell Oil Co.	Wood River, Ill.	283.0	5.0				5.0		0.7
Standard Oil Co. (Ohio)	Lima, Ohio	168.0	2.0		0.4		2.4		
Sun Co., Inc.	Marcus Hook, Pa.	155.0	5.5			10.5	16.0	1.0	
Sun Co., Inc.	Tulsa, Okla.	85.0	7.8				7.8	0.8	
Sun Co., Inc.	Yabucoa, Puerto Rico	85.0	6.5				6.5		1.7
Texaco U.S.A	Port Arthur, Tex.	402.0	12.0	0.6	3.4	4.0	20.0	0.1	1.8
Union Oil Co. of Calif.	Nederland, Tex.	120.0	2.9				2.9	0.1	0.2
Union Oil Co. of Calif.	Rodeo, Calif.	70.0	4.0				4.0	0.6	1.5
Witco Chemical Corp.	Bradford, Pa.	7.6	1.6		0.9		2.5	0.2	
Witco Chemical Corp.	Oildale, Calif.	11.0		2.4		1.9	4.3		
	TOTAL:	5133.9	150.6	18.8	18.3	46.1	233.8	13.7	15.5

Canadian Refineries

Company	Location	Crude Capacity	A	B	C	D	Total	E	F
Gulf Canada Ltd.	Clarkson, Ontario	76.6	4.6				4.6		1.0
Imperial Oil Enterprises Ltd.	Sarnia, Ontario	126.0	5.1	0.7			5.8	0.6	1.6
Imperial Oil Enterprises Ltd.	Strathcona, Alberta	150.0	2.9				2.9		1.1
International Waxes, Ltd.	Agincourt, Ontario							0.8	
Shell Canada Ltd.	Montreal East, Quebec	31.0	3.4				3.4		1.0
	TOTAL:	383.6	16.0	0.7	0.0	0.0	16.7	1.4	4.7

Definitions: A—Solvent extracted paraffinic stocks; B—Solvent extracted naphthenic stocks; C—Unextracted paraffinic stocks; D—Unextracted naphthenic stocks; E—Fully refined, crude scale, and micro waxes; F—Semi-finished, slack waxes and petrolatums.

Source: National Petroleum Refiners Assn., Lubricating Oil and Wax Capacities, 1984.

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U.S. Refineries and Capacities by Companies

(In descending order as of Jan. 1, 1984)

Important note: This listing includes capacity that is operation and capacity that is idle or shut down. In the latter case, this capacity can be restored to normal within 90 days. The Energy Information Administration says there were 247 operable refineries on Jan. 1, 1984, compared with a total of 258 the preceding year. The crude distillation capacity was 16.1-million b/d, compared with the year ago figure of 16.9-million b/d. For earlier data, see 1984 *NPN Factbook*.

Companies with a capacity of more than 100,000 b/d. Number of companies: 31; Total capacity: 13,776,794.

Company	b/d
Standard Oil Co. of California	
Chevron U.S.A.	
El Segundo, CA	405,000
Richmond, CA	365,000
Pascagoula, MS	295,000
Perth Amboy, NJ	168,000
El Paso, TX	76,000
Honolulu, HI	48,000
Salt Lake City, UT	45,000
Bakersfield, CA	26,000
Kenai, AK	22,000
Willbridge, OR	15,000
Baltimore, MD	14,200
Richmond Beach, WA	5,500
Total	1,484,700
Exxon Corp.	
Exxon Co. U.S.A.	
Baytown, TX	494,000
Baton Rouge, LA	455,000
Benicia, CA	109,000
Linden, NJ	100,000
Billings, MT	42,000
Total	1,200,000
Standard Oil Co. of Indiana	
Amoco Oil Co.	
Texas City, TX	415,000
Whiting, IN	376,000
Mandan, ND	56,000
Yorktown, VA	52,000
Casper, WY	48,000
Salt Lake City, UT	40,000
Savannah, GA	24,000
Total	1,011,000
Shell Oil Co.	
Wood River, IL	250,000
Deer Park, TX	250,000
Norco, LA	218,200
Wilmington, CA	93,000
Martinez, CA	91,400
Anacortes, WA	72,000
Odessa, TX	30,600
Total	1,005,200
Texaco Inc.	
Port Arthur, TX	402,000
Convent, LA	140,000
Westville, NJ	90,000
Lawrenceville, IL	84,000
Anacortes, WA	78,000
Wilmington, CA	75,000
Port Neches, TX	31,000
Amarillo, TX	20,000
El Paso, TX	17,000
Total	937,000
Gulf Oil Corp.	
Port Arthur, TX	406,900
Belle Chasse (Alliance), LA	198,500
Philadelphia, PA	174,100
Cleves (Cincinnati), OH	43,700
Total	823,200
Mobil Oil Corp.	
Beaumont, TX	275,000
Joliet, IL	180,000
Torrance, CA	123,500
Paulsboro, NJ	100,000
Ferndale, WA	71,500
Total	750,000
Atlantic Richfield Co.	
Houston, TX	233,000
Carson (Watson), CA	215,000
Ferndale (Cherry Point), WA	135,000
Philadelphia, PA	125,000
North Slope, AK	20,000
Total	728,000
U.S. Steel Corp.	
Marathon Oil Co.	
Garyville, LA	255,000
Robinson, IL	195,000
Texas City, TX	69,500
Detroit, MI	68,500
Total	588,000
Union Oil Co. of California	
Lemont (Chicago), IL	151,000
Beaumont (Nederland), TX	120,000
Wilmington, CA	108,000
Rodeo (San Francisco), CA	70,000
Arroyo Grande, CA	41,000
Total	490,000
Ashland Oil Inc.	
Catlettsburg, KY	213,400
St. Paul Park, MN	67,143
Canton, OH	66,000
Buffalo, NY	64,000
Louisville, KY	25,200
Findlay, OH	20,400
Freedom, PA	6,800
Total	462,943
Standard Oil Co. of Ohio	
Lima, OH	168,000
Toledo, OH	120,000
BP Oil Corp.	
Marcus Hook, PA	168,000
Total	456,000
E.I. Du Pont De Nemours & Co.	
Conoco, Inc.	
West Lake (Lake Charles), LA	156,500
Ponca City, OK	134,000
Billings, MT	48,500
Alvin/Texas City, TX	33,274
Denver (Commerce City), CO	32,500
Santa Maria, CA	9,500
Egan (Acadia), LA	6,500
Total	420,774
Sun Co. Inc.	
Marcus Hook, PA	155,000
Toledo, OH	118,000
Tulsa, OK	85,000
Total	358,000
Southland Corp.[1]	
Citgo Petroleum Corp.[2]	
Lake Charles, LA	320,000
Phillips Petroleum Co.	
Sweeny, TX	175,000
Borger, TX	95,000
Woods Cross, UT	25,000
Total	295,000
Getty Oil Co.	
Getty Refining & Marketing Co.	
Delaware City, DE	140,000
El Dorado, KS	80,577
Bakersfield, CA	48,400
Total	268,977
Tosco Corp.	
Avon, CA	126,000
El Dorado, AR	47,000
Duncan, OK	47,000
Bakersfield, CA	38,800
Total	258,800
Koch Industries Inc.	
Koch Refining Co.	
Rosemount, MN	137,000
Corpus Christi, TX	105,000
Total	242,000
Union Pacific Corp.	
Champlin Petroleum Co.	
Corpus Christi, TX	170,000
Wilmington, CA	60,000
Total	230,000
The Coastal Corp.[3]	
Coastal States Petroleum Co.	
Corpus Christi, TX	87,500
Pacific Refining Co.	
Hercules, CA	55,000
Derby Refining Co.	
North Wichita, KS	28,800
Total	171,300
Kerr-McGee Corp.	
Wynnewood, OK	43,000
Dubach, LA	10,000
Cotton Valley, LA	7,800
Southwestern Refining Co.	
Corpus Christi, TX	104,000
Total	164,800
American Petrofina Co. of Texas	
Port Arthur, TX	90,000
Big Spring, TX	60,000
Total	150,000
Total Petroleum Inc.	
Ardmore, OK	62,000
Arkansas City, KS	42,500
Alma, MI	40,000
Total	144,500
Murphy Oil U.S.A. Inc.[4]	
Meraux, LA	90,200
Superior, WI	39,000
Total	129,200
Earl Holding Co.[5]	
Sinclair Oil Corp.	
Sinclair, WY	53,000
West Tulsa, OK[6]	50,000
Little America Refining Co.	
Casper, WY	24,500
Total	127,500
Agway Petroleum Corp.	
Texas City Refining Inc.	
Texas City, TX	119,500
Diamond Shamrock Corp.	
Diamond Shamrock Refining	

Company	b/d
& Marketing Co.[7]	
Sunray, TX	73,300
Sigmor Corp.	
Three Rivers, TX	43,500
Total	116,800
Tenneco Oil Co.	
Chalmette, LA	114,000
Mid-America Pipe Line System	
Mapco Petroleum Co.	
Memphis, TN[8]	60,000
North Pole, AK[9]	45,000
Total	105,000
Apex Oil Co.	
Clark Oil & Refining Corp.	
Blue Island, IL	57,000
Hartford (Wood River), IL	47,500
Total	104,500

Companies with capacity 30,001 to 100,000 b/d. Number of companies: 27; Total capacity: 1,417,290.

Company	b/d
Crown Central Petroleum Corp.	
Pasadena, TX	100,000
Pennzoil Co.	
Rouseville, PA	15,700
Atlas Processing Co.	
Shreveport, LA	76,500
Total	92,200
Farmland Industries Inc.	
Coffeyville, KS	56,500
Phillipsburg, KS	26,400
Total	82,900
Louisiana Land & Exploration Co.	
Mobile, AL	80,000
Tesoro Petroleum Corp.	
Kenai, AK	48,500
Carrizo Springs, TX	26,100
Total	74,600
Coral Petroleum	
Warren, PA[10]	60,000
Vulcan Refining Co.	
Tuscaloosa, AL	9,500
Total	69,500
Charter International Oil Co.	
Houston, TX	65,000
Goldking Refining Ltd.	
Hill Petroleum Co.	
Krotz Springs, LA	57,400
National Cooperative Refinery Assn.	
McPherson, KS	54,000
Husky Oil Co.	
Cheyenne, WY	28,800
North Salt Lake, UT	25,000
Total	53,800
Pacific Oasis Corp.	
Paramount, CA	46,500
Texas Eastern Corp.[11]	
La Gloria Oil & Gas Co.	
Tyler, TX	46,000
Placid Oil Co.	
Placid Refining Co.	
Port Allen, LA	45,000
Seaview Petroleum Co.	
Paulsboro, NJ	44,400
Powerine Oil Co.	
Santa Fe Springs, CA	44,120
Rock Island Refining Corp.	
Indianapolis, IN	43,200
Pride Refining Inc.	
Abilene, TX	42,750
Thrifty Oil. Co.[12]	
Golden West Refining Co.	
Santa Fe Springs, CA	42,000
Cirillo Brothers Oil Co.	
Cibro Petroleum Products	
Albany, NY	41,850
Penn Central Energy Corp.[13]	
Edgington Oil Co.	
Long Beach, CA	41,600
Farmers Union Central Exchange (Cenex)	
Laurel, MT	41,450
Mid-Gulf Energy Inc.[14]	
Ingleside, TX	39,400
Southern Union Refining Co.	
Lovington, NM	36,100
Hunt Oil Co.	
Tuscaloosa, AL	33,500
American Ultramar Ltd.	
Beacon Oil Co.	
Hanford, CA	17,300
Golden Eagle Refining Co.	
Carson, CA	16,170
Total	33,470
Quintana Refinery Co.	
Quintana Petrochemical Co.	
Corpus Christi, TX	33,300
Pester Corp.	
Pester Refining Co.	
El Dorado, KS	33,250

Companies with capacity 10,001 to 30,000 b/d. Number of companies: 36; Total capacity: 739,516.

Company	b/d
Amerada Hess Corp.	
Purvis, MS	30,000
Holly Corp.	
Navajo Refining Co.	
Artesia, NM	29,930
Fletcher Oil & Refining Co.	
Carson, CA	29,500
International Processors	
St. Rose, LA	28,356
Semarck California Inc.	
Independent Valley Energy Co.	
Bakersfield, CA	27,000
Mobile Bay Refining Co.	
Chickasaw, AL	26,600
Dorchester Gas Corp.	
Dorchester Refining Co.	
Mount Pleasant, TX	26,500
Asamera Oil (U.S.)	
Commerce City (Denver), CO	26,000
Time Oil Co.	
U.S. Oil & Refining Co.	
Tacoma, WA	25,000
Cryaen Corp.	
Woods Cross, UT	12,500
Tacoma, WA	11,900
Total	24,400
Oklahoma Refining Co.	
Cyril, OK	12,750
Thomas, OK	11,600
Total	24,350
San Joaquin Refining Co.	
Bakersfield, CA	24,300
Suburban Propane Gas Corp.	
Plateau Inc.	
Bloomfield, NM	16,800
Roosevelt, UT	7,500
Total	24,300
U.S.A. Petrochem Corp.	
Ventura, CA	24,000
Kern Oil & Refinery Co.	
Bakersfield, CA	21,400
Pauley Petroleum	
Newhall Refining Co.	
Newhall, CA	21,400
Indiana Farm Bureau Cooperative	
Mount Vernon, IN	21,200
Marlex Petroleum Inc.	
Marlex Oil & Refining	
Long Beach, CA	21,100
Quaker State Oil Refining Corp.	
Newell (Congo), WV	9,515
Smethport (McKean), PA	6,700
St. Mary's (Ohio Valley), WV	4,650
Total	20,865
Ergon Refining	
Vicksburg, MS	20,600
E-Z Serv Inc.	
Amber Refining Co.	
Fort Worth, TX	20,000
Texas Napco Inc.	
St. James, LA	20,000
Gladieux Refinery	
Fort Wayne, IN	19,000
West Coast Oil Co.	
Oildale, CA*	19,000
Texas Oil & Chemical Co.	
South Hampton Refining Co.	
Silsbee, TX	18,100
Giant Industries Inc.	
Gallup (Ciniza), NM	18,000
MacMillan Ring-Free Oil Co.	
MacMillan Petroleum Inc.[15]	
Long Beach, CA	11,000
Norphlet, AK	5,880
Total	16,880
Vermont Gas Systems (VGS)	
Southland Oil Co.	
Sandersville, MS	11,000
Lumberton, MS	5,800
Total	16,800
CPI Oil & Refining	
Lake Charles, LA	13,500
Gary Energy Co.	
Gary Western Co.	
Fruita, CO	13,100

Company	b/d
Hermes Products Co.	
Wyoming Refining Co.	
Newcastle, WY	12,555
Ray Bell Oil Co.	
Tonkawa Refining Co.	
Arnett, OK	12,000
World Oil Co.	
Sunland Refining Corp.	
Bakersfield, CA	12,000
Goodyear Tire & Rubber Co.	
Celeron Oil & Gas Co.	
Mermentau, LA	11,000
Caribou-Four Corners	
Woods Cross, UT	8,400
Farmington (Kirtland), NM*	2,200
Total	10,600
Flying J Inc.	
Cutbank, MT	5,600
Williston, ND*	4,580
Total	10,180

Companies with capacity 10,000 b/d or less. Number of companies: 39; Total capacity: 203,541.

Company	b/d
Coastal Petroleum Co.	
Paloma, CA*	10,000
Mitchell Energy Corp.	
Liquid Energy Corp.	
Bridgeport, TX	10,000
Howell Corp.	
San Antonio, TX	9,900
Moore & Munger Inc.	
Cross Oil & Refining Co.	
Smackover, AR	9,400
Gasco Gasoline Inc.[16]	
Anchor Refining Co.	
McKittrick, CA	9,000
Lakeside Refining Co.	
Kalamazoo, MI	5,600
Crystal Refining Co.	
Carson City, MI	3,000
Total	8,600
Thagard Oil Co.	
Lunday-Thagard Oil Co.	
South Gate, CA	8,100
Anchor Gasoline Co.	
Canal Refining Co.	
Church Point, LA	8,000
Laketon Refining Corp.	
Laketon, IN	7,900
Vicksburg Refining Inc.	
Vicksburg, MS	7,900
Allied Materials Corp.	
Stroud, OK	7,600
Witco Chemical Corp.	
Bradford, PA	6,841
Huntway Refining Co. of Northern California	
Van Nuys, CA	6,750
Claiborne Gasoline Co.	
Lisbon, LA	6,500
Simmons Oil Co.	
Simmons Refining Corp.	
Great Falls, MT	6,300
Thriftway Co.	
Bloomfield, NM	6,100
Morrison Petroleum Co.	
Woods Cross, UT	6,000
Somerset Refinery Inc.	
Somerset, KY	5,500
Warrior Asphalt Co. of Alabama	
Holt, AL	5,500
Huntway Refining Co.	
Wilmington, CA	4,750
Kenco Refining Inc.	
Wolf Point, MT	4,700
Tropicana Energy Co.[17]	
Euless, TX	4,650
Nevada Refining Co.	
Tonopah, NV	4,500
Young Refining Corp.	
Douglasville, GA	4,500
Calumet Industries	
Calumet Refining Co.	
Princeton, LA	4,400
Oxnard Refinery	
Oxnard, CA	4,000
Eddy Refining Co.	
Houston, TX	3,250
Crystal Oil Co.	
Stephens, AR	3,200
Port Petroleum	
Stonewall, LA	3,200
B-T Energy Corp.	
Louisville, KY	3,000
Gibson Oil & Refining Co.	
Bakersfield, CA*	3,000
GNC Energy Corp.	
Greensboro, NC	3,000
Petromax	
Houston, TX	2,000
Kentucky Oil & Refining Co.	
Troy, IN	1,000
Betsy Lane, KY	600
Total	1,600
Flint Chemical Co.	
San Antonio, TX	1,500
Moreco Energy Inc.	
McCook, IL	1,000
Petrolite Corp.	
Kilgore, TX	1,000
American Refining Group Inc.	
Indianola, PA	200
Mountaineer Refining Co.	
La Barge, WY	200

Company	b/d

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[1] Formerly Occidental Petroleum
[2] Formerly Cities Service Co.
[3] Formerly Coastal States Marketing Corp.
[4] Formerly Murphy Oil Corp.
[5] Formerly Little America Refining Co.
[6] Formerly Texaco Inc.
[7] Formerly Diamond Shamrock Corp.
[8] Formerly Delta Refining Co.
[9] Formerly North Pole Refining Co.
[10] Formerly United Refining Co.
[11] Formerly Texas Eastern Transmission Corp.
[12] Formerly Gulf Oil Corp.
[13] Formerly Penn Central Corp.
[14] Formerly Uni Refining Inc.
[15] Formerly MacMillan Ring-Free Oil Co.
[16] Formerly Sierra Anchor/Sierra Energy Assn.
[17] Formerly TARCO

*Refinery was reactivated during 1983.

Source: Petroleum Supply Annual, 1984, Energy Information Administration.

U.S. Refinery Closings—1981 through 1984

In 1984 another 18 refineries in the U.S. were shut down, paring the total of remaining facilities to 229. The shutdowns cost the industry 415,370 b/d of crude distillation capacity, but new construction and modifications to existing facilities during the year offset some of that, and the net loss ended up being about 360,000 b/d.

At the end of 1984, the U.S. had an operable refining capacity of about 16.1-million b/d, continuing the downward slide of recent years. The capacity is projected to fall to an average of 15.8-million b/d in 1985. With fewer facilities, however, refining utilization has been improving. The 1984 average was 76.4% compared to 1983's 71.7% and 1981's 68.5%.

PAD District/Refinery	Location	Crude Distillation Capacity (B/CD)	Total Downstream Capacity (B/SD)	Date of Last Operation	Date Shutdown	Years in Operation
District 1						
Amerada Hess Corp.	Port Reading, N.J.	68,000	79,000	12/74	12/83	25
Amoco Oil Co.	Baltimore, Md.	15,000	0	1/82	3/82	25+
ATC Petroleum Inc.	Wilmington, N.C.	11,900	0	7/81	1/82	8
ATC Petroleum Inc.	Newington, N.H.	13,400	0	7/81	1/82	7
ELK Refining Co., div. of Pennzoil Co. Inc.	Falling Rock, W.Va.	5,600	2,000	12/82	1/83	25+
Manatee Energy Co.	Port Manatee, Fla.	28,400	0	5/81	10/81	2
Mobil Oil Corp.	Buffalo, N.Y.	43,000	67,000	5/81	7/81	25+
Quaker State Oil Refining Corp.	Emlenton, Pa.	0	2,980	12/83	12/83	25+
Seminole Refining Inc.	St. Marks, Fla.	15,000	10,000	12/81	4/82	25+
Total		**200,300**	**160,980**	—	—	—
District 2						
Amoco Oil Co.	Sugar Creek, Mo.	104,000	185,500	5/82	6/82	25+
Amoco Oil Co.	Wood River, Ill.	104,000	127,000	5/81	10/81	25+
Champlin Petroleum Co.	Enid, Okla.	53,800	58,500	6/83	12/83	25+
Conoco Inc.	Wrenshall, Minn.	23,500	25,700	5/81	9/81	5
CRA, Inc.	Scottsbluff, Neb.	5,600	3,650	5/82	6/82	25+
Dillman Oil Recovery Inc.	Oblong, Ill.	1,200	0	1/81	2/82	4
Dow Chemical U.S.A.	Bay City, Mich.	20,000	0	5/80	9/81	25+
E-Z Serv Refining Inc.	Shallow Water, Kan.	9,500	0	4/81	2/82	25+
Energy Cooperative Inc.	East Chicago, Ind.	126,000	190,000	5/81	6/82	25+
Energy Development	Crossville, Ill.	1,000	0	2/81	4/81	22
Gulf Oil Corp.	Toledo, Ohio	50,300	61,800	6/81	11/81	25+
Hudson Refining Co. Inc.	Cushing, Okla.	19,000	12,150	12/82	11/83	6
Indiana Refining Inc.	Princeton, Ind.	5,000	0	12/80	2/81	23
Industrial Fuel and Asphalt of Indiana Inc.	Hammond, Ind.	7,600	0	12/81	6/82	25+
Mid-America Refining Co. Inc.	Chanute, Kan.	3,000	1,800	3/81	7/82	25+
Mobil Oil Corp.	Augusta, Kan.	50,000	83,900	9/83	9/83	25+
Northland Oil and Refining Co.	Dickinson, N.D.	5,000	0	2/81	2/82	7
Okmulgee Refining Co.	Okmulgee, Okla.	25,000	13,200	6/82	1/83	25+
Phillips Petroleum Co.	Kansas City, Kan.	80,000	156,700	8/82	9/82	25+
Texaco Inc.	Lockport, Ill.	72,000	136,000	4/81	10/81	25+
Texas American Petrochemical Inc.	West Branch, Mich.	11,500	3,200	9/81	2/82	25+
Tonkawa Refining Co.	Arnett, Okla.	12,000	6,000	1984	1984	16
Tosco Corp.	Duncan, Okla.	47,000	85,000	1984	1984	4
Wireback Oil Co.	Plymouth, Ill.	1,800	1,800	2/81	3/81	25+
Total		**838,600**	**1,151,900**	—	—	—
District 3						
Adobe Refining Co., div. of Funding Systems Refining Corp.	La Blanca, Texas	5,200	0	11/81	1/82	25+
Bayou State Oil Corp.	Hosston, La.	3,000	0	1/81	3/82	25+
Brio Refining Inc.	Friendswood, Texas	12,500	0	9/82	1/83	4
Bronco Refining Co.	Houston, Texas	2,250	0	4/81	7/82	1
Carbonit Refining Inc.	Hearne, Texas	11,000	0	2/81	1/82	6
Caribou-Four Corners, Inc.	Farmington, N.M.	2,200	2,400	1984	1984	19
Celeron Oil & Gas Co.	Mermentau, La.	11,000	0	1984	1984	6
Clinton Manges	Palestine, Texas	6,000	0	7/81	7/82	25+
Copano Refining Co.	Ingleside, Texas	11,100	0	9/81	2/82	4
Dorchester Refining Co.	Mt. Pleasant, Texas	26,500	38,800	1984	1984	6
Dow Chemical U.S.A.	Freeport, Texas	190,000	143,000	8/81	6/82	1
Eagle Refining Corp.	Jacksboro, Texas	1,800	0	3/81	7/82	1
Eddy Refining Co.	Houston, Texas	3,250	0	1984	1984	36+
Erickson Refining Corp.	Pt. Neches, Texas	30,000	0	12/81	8/83	4
Evangeline Refining Co.	Jennings, La.	4,500	0	12/82	1/83	25+
GHR Energy Corp.	Good Hope, La.	300,000	433,000	12/82	9/83	15
Giant Industries Inc.	Farmington, N.M.	13,500	5,000	5/82	11/82	7
Gulf Oil Corp.	Venice, La.	28,700	46,300	4/81	12/81	13
Hill Petroleum Co.	Knots Springs, Texas	57,400	62,000	1984	1984	7
Independent Refining Corp.	Winnie, Texas	50,000	63,000	10/81	8/83	23
Lake Charles Refining Co.	Lake Charles, La.	28,000	0	4/81	2/82	2
Listo Refining Co.	Donna, Texas	3,500	0	7/82	12/82	4
Longview Refining Co.	Longview, Texas	14,000	14,000	12/81	4/82	25+
Mallard Resources Inc.	Gueydan, La.	7,400	0	11/83	12/83	4
Marion Corp.	Theodore, Ala.	25,000	14,500	3/83	9/83	15
McTan Refining Corp.	St. James, La.	19,300	0	7/81	8/83	6
Mid-Gulf Energy Corp.	Engleside, Texas	39,400	20,000	1984	1984	3
Natchez Refining Co.	Natchez, Miss.	16,000	0	6/82	9/82	2
Petraco-Valley Oil Refining Co.	Brownsville, Texas	12,300	0	3/83	12/83	5
Pioneer Refining Ltd.	Nixon, Texas	15,000	15,900	4/83	12/83	9
Placid Oil Co.	Mont Belvieu, Texas	8,500	0	1/82	7/82	2
Port Petroleum Co.	Stonewall, La.	3,200	0	1984	1984	5
Quintana Petrochem Co.	Corpus Christi, Texas	33,000	54,000	1984	1984	30

PAD District/Refinery	Location	Crude Distillation Capacity (B/CD)	Total Downstream Capacity (B/SD)	Date of Last Operation	Date Shutdown	Years in Operation
Quitman Refining Co.	Quitman, Texas	6,600	0	4/82	6/82	4
Rio Grande Crude Refining	Brownsville, Texas	9,500	0	6/81	6/82	3
Rio Grande Recovery Systems Inc.	Brownsville, Texas	1,000	0	5/81	2/82	2
Schuize Processing Inc.	Tallulah, La.	1,760	0	5/81	8/82	4
Sentry Refining Inc.	Corpus Christi, Texas	25,000	0	1/82	2/82	4
Shepard Oil Co.	Jennings, La.	10,000	0	5/81	2/82	4
Shore, Inc.	Kilgore, Texas	550	0	3/83	7/83	3
Sooner Refining Co.	Darrow, La.	8,000	32,200	1/82	2/82	2
Southern Union Refining Co.	Monument, N.M.	5,400	0	1/81	10/81	25 +
Southern Union Refining Co.	Lovington, N.M.	36,100	18,500	1984	1984	8
Southland Oil Co.	Yazoo City, Miss.	5,500	3,080	2/81	7/81	25 +
T & S Refining Co.	Jennings, La.	10,500	0	7/81	3/82	2
Tesara Petroleum Co.	Carrizo Springs, Texas	26,100	3,500	1984	1984	27
Texas Refining Co.	Midland, Texas	2,500	0	4/81	6/81	1
Texas Standard Refining Inc.	Houston, Texas	1,800	0	1/81	10/81	(S)
Thriftway Oil Co.	Graham, Texas	1,184	0	4/81	11/83	25 +
Tipperary Refining Co.	Ingleside, Texas	7,320	0	1/82	3/82	4
Warrior Asphalt Co.	Holt, Ala.	5,500	2,000	1984	1984	30
Wickett Refining Co.	Wickett, Texas	8,000	0	1/76	2/82	25 +
Total		**1,135,014**	**951,200**	—	—	—
District 4						
Caribou-Four Corners Inc.	Woods Cross, Utah	8,400	8,200	1984	1984	21
C & H Refinery Inc.	Lusk, Wyo.	180	0	1/81	2/82	25 +
Glacier Park Co.	Osage, Wyo.	10,000	0	2/81	3/82	4
Glenrock Refinery Inc.	Glenrock, Wyo.	6,000	0	4/81	9/81	5
Husky Oil Co.	Cody, Wyo.	11,500	17,800	6/82	9/82	25 +
Sage Creek Refining Co.	Cowley, Wyo.	1,000	0	1/82	6/82	17
Silver Eagle Oil Inc.	La Barge, Wyo.	1,500	0	10/82	8/83	9
Southwestern Refining Co.	La Barge, Wyo.	1,040	0	4/81	8/81	7
Texaco Inc.	Casper, Wyo.	21,000	35,500	3/82	7/82	25 +
Total		**60,600**	**61,500**	—	—	—
District 5						
Arizona Fuels Corp.	Fredonia, Ariz.	6,000	0	2/83	9/83	11
Demenno-Kerdoon	Compton, Calif.	10,000	2,000	1/83	8/83	6
ECO Petroleum Inc.	Long Beach, Calif.	0	7,000	1984	1984	8
Marlex Oil & Refining Co.	Los Angeles, Calif.	21,100	0	1984	1984	7
Powerine Oil Co.	Santa Fe Springs, Calif.	44,120	100,100	1984	1984	34
Quad Refining Corp.	Bakersfield, Calif.	7,000	0	8/80	10/81	2
Road Oil Sales Inc.	Bakersfield, Calif.	6,000	0	1/81	1/82	9
Sabre Oil and Refining Inc.	Bakersfield, Calif.	10,000	0	4/81	11/82	10
Tosco Corp.	Bakersfield, Calif.	38,800	80,000	1984	1984	33
United Independent Oil Co.	Tacoma, Wash.	730	0	7/80	3/82	7
Total		**122,650**	**189,100**	—	—	—
U.S. Total		**2,430,684**	**2,534,660**	—	—	—

Source: Energy Information Administration, Petroleum Supply Monthly, June 1984 and January 1985.

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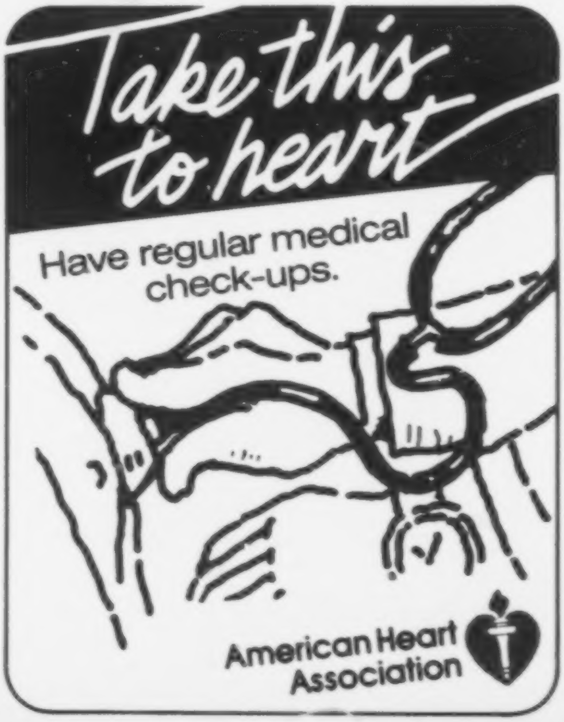
American Heart Association



When one thing separates your fuel from the ground, it better be a PetroGard™ secondary containment system.

Nothing makes secondary containment of underground fuel storage more reliable than the new PetroGard flexible liner system (patent pending) from MPC. It's a puncture and fuel-resistant system made of Hytrel coated* polyester produced by Cooley, Inc. Long used in fuel line hoses, gaskets, automotive boots and other chemical containment systems, a reinforced Hytrel membrane is best for lining excavations and trenches surrounding underground fuel storage tanks.

The complete PetroGard system includes:

- one simple-to-install liner that is truly a second line of defense* in underground storage;
- a complete trenching system, enclosed with our exclusive InterLok™ sealing device, to protect your underground fuel delivery system right up to your pumps . . . through the piping and connections in which 60% of all your leaks occur;
- a membrane that is made with Hytrel . . . the toughest material available for underground containment of fuel and other chemicals; and, made to the exact standard of Cooley, Inc. . . . one of the most technologically-advanced suppliers of liners for all type of corrosive liquids.

When you think about it, there is not a better method for secondary containment than PetroGard.

Hytrel is a product of E.I. Dupont de Nemours & Co., Inc. Membrane manufactured by Cooley, Inc.
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MPC MPC Containment Systems, Ltd., 4834 South Oakley, Chicago, IL 60609
Or call, toll-free, 1-800-621-0146. In Illinois, call 312-927-4120.

Association Who, What and Where

American Petroleum Institute

1220 L St., N.W.
Washington, DC 20005
(202) 682-8000
4,000 individual
230 corporate election Nov.

Officers:
Chmn: John F. Bookout, Shell Oil Co., Houston
Pres: Charles J. DiBona
Sr. VP: Stephen P. Potter
VP: Michael E. Canes
VP: Phil G. Goulding
VP: Frank J. Jandrowitz
VP: William F. O'Keefe
VP: Charles E. Sandler
VP: C.T. Sawyer
Treas: Theodore A. Burtis, Sun Co., Radnor, PA
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External Liaison: D. A. Scott
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Syn. Fuels: Bruce Petersen
General Counsel: Stark Richie

Marketing Staff:
Dir: Gerald A. Schanke
ASTM: Earl A. Thompson
Fuels & Lubricants: Albert L. Modiano
Marketing Affairs: Kathleen Kerley
Operations & Engineering: Rudy C. White, Todd G. Schwendeman, Bruce Bauman

Marketing Committee Chairmen:
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Marketing Affairs: G.H. Babikian, Atlantic Richfield Co., Los Angeles, CA
Fuels & Lubricants: R. W. Garey, Calumet Refining Co., Chicago, IL
Operations & Engineering: M. L. Dimond, Texaco U.S.A., Houston, TX

Petroleum Marketers Assn. of America

1120 Vermont Ave. N.W., Suite 1130
Washington, DC 20005
(202) 331-1128
42 member assns. election Oct.
Pres: David T. Robinson, Robinson Oil, Garden City, KS
Exec. VP: Philip R. Chisholm

SIGMA

Society of Independent Gasoline Marketers of America
1730 K. Street N.W., Suite 907
Washington, DC 20006
(202) 429-9333
290 members election Nov.
Pres: Michael S. Kirschner, Kirschner Brothers Oil Co., Havorford, PA
Exec. Dir: Kenneth A. Doyle

Petroleum Equipment Institute

P.O. Box 2380
Tulsa, OK 74021
(918) 743-9941
1,050 members election Aug.
Pres: Leland M. Freeman, SE&M Inc., Victoria, TX
Exec. VP: Howard Upton

Petroleum Marketing Education Foundation

101 North Alfred Street
Alexandria, VA 22314
(703) 684-0000
1,500 members election Jan.
Pres: William G. Lyden Jr., Lyden Oil Co., Youngstown, OH
Exec. VP: Michael T. Scanlon Jr.

REGIONAL

Alabama Oilmen's Assn.
401 Interstate Park Drive
Montgomery, AL 36109
(205) 277-0786
500 members election June
Pres: Don Morris, Morris Oil Co., Gadsden, AL
Exec. VP: Stephen A. Dickson

Arizona Petroleum Marketers Assn.
P.O. Box 26905
Phoenix, AZ 85068
(602) 942-9173
150 members election July
Pres.: William Woodroffe, Kaibab Industries, Phoenix, AZ
Exec. VP: Andy Pala

Arkansas Oil Marketers Assn.
P.O. Box 229
Little Rock, AR 72203
(501) 374-6293
170 members election June
Pres: F. L. Robertson, Robertson Oil Co., Fayetteville, AR
Exec. VP: Bob "Sody" Arnold

California Independent Oil Marketers Assn.
555 Capitol Mall, Suite 655
Sacramento, CA 95814
(916) 441-5166
528 members election Nov.
Pres: Ron Ahlport, R.V. Ahlport Inc., Watsonville, CA
Exec. VP: James F. Divine

Colorado-Wyoming-New Mexico Petroleum Marketers. Assn.
4465 Kipling St., Suite 104
Wheat Ridge, CO 80033
(303) 422-7805
350 members
Pres: Colorado—Don Morrison, D-J Petroleum, Limon, CO; Wyoming—Joe Deromedis, Deromedis Oil Co., Cokeville, WY; New Mexico—Mike Steele, Rio Grande Oil Co., Albuquerque, NM
Exec. VP: Roy Turner

Empire State Petroleum Assn.
8 Westchester Plaza—Executive Park
Elmsford, NY 10523
(914) 592-8810
Pres: William F. Huberlie, Hub-Langie Fuel Co., Rochester, NY
Exec. VP: Robert D. Lynch

Florida Petroleum Marketers Assn.
209 Office Plaza
Tallahassee, FL 32301
(904) 877-5178
230 members election Aug.
Pres: Bill Lank Jr., Lank-Como Oil Co., Ft. Lauderdale, FL
Exec. VP: L. Carl Adams

Fuel Merchants Assn. of New Jersey
66 Morris Avenue
Springfield, NJ 07081
(201) 379-1100
430 members election May
Pres: Craig Allen, Central Jersey Oil Co., Lakewood, NJ
Exec. VP: Fred J. Sacco

Georgia Oilmen's Assn.
3300 NE Expressway, Suite 8P
Atlanta, GA 30341
(404) 451-5916
455 members election Oct.
Chmn: William Oglesby, Oglesby Oil Co., Athens, GA
Pres: Roger T. Lane

Idaho Intermountain Oil Marketers
(See Intermountain Oil Marketers Assn.)

Illinois Petroleum Marketers Assn.
112 West Cook St.
P.C. Box 1508
Springfield, IL 62705
(217) 544-4609
700 members election March
Pres: Thomas O. Plunkett, Burnex Oil Co., Cicero, IL
Exec. VP: William R. Deutsch

Independent Oil Men's Assn. of New England
25 Sea Breeze Lane
New Castle, NH 03854
(603) 436-8424
50 members election fall
Chmn: Steven Shaer, Mutual Oil Co., Brockton, MA
Pres: Wilfred H. Hall

Independent Connecticut Petroleum Assn.
621 Farmington Ave.
Hartford, CT 06105
(203) 236-0851
350 members election June
Pres: John Cuneen, Danielson Oil Co., Danielson, CT
Exec. VP: Charles S. Isenberg

Indiana Oil Marketers Assn.
8780 Purdue Road
Indianapolis, IN 46268
(317) 875-9057
343 members election Oct.
Pres: Richard L. Johnson, Johnson Oil Co., Columbus, IN
Exec. VP: L. Jack Stough

Inland Empire Chapter (IOMA)
(See Intermountain Oil Marketers Assn.)

Intermountain Oil Marketers Assn.
1800 S. West Temple #300
Salt Lake City, UT 84115
(801) 484-8719
525 members (6-state region) election July
Pres: Max A. Eggertsen, Maetex Supply, Provo, UT
Exec. VP: Gerald Tedrow

Petroleum Marketers of Iowa
321 E. 6th Street
P.O. Box 6156
Des Moines, IA 50309
(515) 244-6273
1,172 members election Feb.
Pres: Dave Joyce, Super Oil, Keokuk, IA
Man. Dir: E. A. Kistenmacher

Kansas Oil Marketers Assn.
804 Merchants National Bank
Topeka, KS 66612
(913) 233-9655
279 members election March
Pres: Harold Taylor, Taylor Oil Co., Wellsville, KS
Exec. Dir: Charles H. Nicolay

Kentucky Petroleum Marketers Assn.
612-A Shelby Street,
Frankfort, KY 40601
(512) 875-3742
100 members election March
Pres: C. Lee Anderson, Denton Service Co., Denton, KY
Exec. Dir: Thomas H. Maxedon

Louisiana Oil Marketers Assn.
P.O. Box 1
Shreveport, LA 71161
(318) 221-4113
376 members election July
Pres: Scriven Taylor, Citgo, Natchitoches, LA
Exec. Dir: Robert K. Butcher

Maine Oil Dealers Assn.
P.O. Box 536
Yarmouth, ME 04096
(207) 846-5113
300 members election June
Chmn: James G. Carey, Carey's Fuel Co., Rumford, ME

Michigan Petroleum Assn.
1200 Michigan National Tower
Lansing, MI 48933
(517) 487-9139
325 members election April
Pres: James Butler, Mid-States Petroleum Inc., Troy, MI
Exec. VP: Thomas Cordell

Mid-Atlantic Petroleum Distributors Assn.
198 Thomas Johnson Drive, Suite 110
Frederick, MD 21701
(301) 694-0808
250 members election Sept.
Pres: Caleb Ewing Jr., Ewing Oil Co.
Exec. VP: Robert Irvin

Midwest Petroleum Assn.
10400 Higgins Road, Suite 126
Rosemont, IL 60018
(312) 298-5370
275 members election June
Pres: Ernst Shafer, Smith/Shafer Oil Co., Rockford, IL
Exec. VP: Donald E. Woodrick

Mississippi Petroleum Marketers Assn.
P.O. Box 257
Jackson, MS 39205
(601) 353-1624
300 members election June
Pres: Dan Waring, Waring Oil Co., Vicksburg, MS
Exec. Dir: Marshall Lusk

Missouri Oil Jobbers Assn.
238 E. High St., Suite 3A
Jefferson City, MO 65101
(314) 635-7117
400 members election Feb.
Pres: Gary C. Brown, D.S. Caldwell Oil Co., Richland, MO
Exec. VP: John R. Hahn

Montana Intermountain Oil Marketers
(See Intermountain Oil Marketers Assn.)

Nebraska Petroleum Marketers
1320 Lincoln Mall
Lincoln, NE 68508
(402) 474-6691
407 members election March
Pres: Rex Ekwall, Rite Way Oil & Gas Co., Omaha, NE
Exec. VP: George L. Watters

Nevada Chapter (IOMA)
(See Intermountain Oil Marketers Assn.)

New Mexico Petroleum Marketers Assn.
(See Colorado-Wyoming-New Mexico Petroleum Marketers Assn.)

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Princeton, New Jersey
Mountain View, CA
Toronto, Canada

North Carolina Petroleum Marketers Assn.
P.O. Box 30519
Raleigh, NC 27622
(919) 782-4411
750 members election Oct.
Pres: Larry Jordan, L.G. Jordon Oil Co., Apex, NC
Exec. VP: Don M. Ward

Northwest Petroleum Assn.
2345 Rice Street, Suite 173
St. Paul, MN 55113
(612) 484-7227
600 members election March
Pres: Fred Curtis, Curtis Oil, Duluth, MN
Exec. Dir: Bob Krogman

Ohio Petroleum Marketers Assn.
50 West Broad Street, Suite 1130
Columbus, OH 43215
(614) 224-6271
500 members election April
Pres: Don Lykins, Lykins Oil Co., Milford, OH
Exec. VP: Roger F. Dreyer

Oil Jobbers of Wisconsin
1220 Femrite Drive
Madison, WI 53716
(608) 221-4771
500 members election April
Pres: Arlen Rusch, Wausau, WI
Exec. VP: Raymond G. Karnes

Oklahoma Oil Marketers Assn.
5115 N. Western Ave.
Oklahoma City, OK 73118
(405) 842-6625
450 members election May
Pres: Paul Welch, Welch Oil Co., Wichita Falls, TX
Exec. VP: Charles V. Stuckey

Oregon Petroleum Marketers Assn.
3130 S.W. Ridgewood Road
Portland, OR 97225
(503) 292-2700
112 members election Nov.
Pres: Robert L. Newburn, Pacific Petroleum Corp., Eugene, OR
Exec. VP: Bob Kupfer

Pacific Oil Conference
555 Capitol Mall, Suite 655
Sacramento, CA 95814
(916) 446-1312
865 members election Sept.
Gen. Chmn: Robert F. Rinehart, Rinehart Oil Inc., Ukiah, CA
Exec. Dir: James F. Divine

Pennsylvania Petroleum Assn.
#2 Shore Drive Center, Suite 121
2001 N. Front St.
Harrisburg, PA 17102
(717) 233-5838
707 members election fall
Pres: Alan R. Guttman, Guttman Oil Co., Belle Vernon, PA
Exec. VP: John P. Zinkand

South Carolina Oil Jobbers Assn.
1809 Godsden
P.O. Box 64
Columbia, SC 29202
(803) 765-9570
280 members election Dec.
Pres: Bill Bird, Bird Oil Co., Hilton Head Island, SC
Exec. Dir: Dick deMontmollin
Asst. Exec. Dir: David W. Reed

South Dakota Petroleum Marketers Assn.
Box 1058
Pierre, SD 57501
(605) 224-8606
election Sept.
Pres: Rudy Gerstner, Gerstner Oil Co., Yankton, SD
Exec. VP: Curt Neuharth

Tennessee Oil Marketers Assn.
430 Enos Reed Drive
P.O. Box 23256
Nashville, TN 37202
(615) 242-4377
election Nov.
Pres: David Adcox, The Highland Corp., Hohenwald, TN
Exec. Dir: Elizabeth Walker

Texas Oil Marketers Assn.
701 W. 15th Street
Austin, TX 78701
(512) 476-9547
1,000 members election April
Pres: Jerdy Gary, Sooner Oil, Denison, TX
Exec. Dir: Dave Fellers

Utah Chapter (IOMA)
(See Intermountain Oil Marketers Assn.)

Virginia Petroleum Jobbers Assn.
P.O. Box 6344
Richmond, VA 23230
(804) 282-7534
212 members election Oct.
Pres: Terry M. Phelps, Whiting Oil Co., Roanoke, VA
Exec. VP: E. D. Catterton

Washington Oil Marketers Assn.
400 Dexter Ave. N.
Seattle, WA 98109
(206) 623-8733
75 members election Dec.
Pres: Doug True, Gull Industries, Seattle, WA
Exec. VP: C. Ed Bishop

West Virginia Petroleum Marketers Assn.
Atlas Building, Suite 806
Charleston, WV 25301
(304) 343-5885
90 members election Sept.
Pres: Ralph C. Hess Jr., Hess Oil Co., Elkins, WV
Exec. Dir: David W. Haines

Wyoming Petroleum Marketers Assn.
(See Colorado-Wyoming-New Mexico Marketers Assn.)

PRIVATE BRAND

Independent Gasoline Marketers Council
1133 15th Street N.W
Washington, D.C. 20005
(202) 857-0220
17 members
Exec. VP: Jack A. Blum

Kentucky Independent Gasoline Marketers Assn.
3906 Dupont Sq. So.
Louisville, KY 40207
(502) 897-7167
60 members election March
Pres: Kenneth H. Stephens, Ken Stephens Oil Co., Louisville, KY
Exec. Dir: Jesse F. Simpson

Serve Yourself & Multiple Pump Assn.
3960 Wilshire Blvd, Ste. 401-A
Los Angeles, CA 90010
(213) 387-3114
Pres: Gary L. Webb, Pronto Oil Co., Bell Gardens, CA
Exec. Dir.: Paul T. Erdos

Southeastern Independent Oil Marketers Assn.
6045 Barfield Road N.E., Suite 104
Atlanta, GA 30328
(404) 256-5541
502 members election June
Pres: Millard Young, National Refining, Birmingham, AL
Exec. VP: Ivan Maple

Texas Independent Producers & Royalty Owners Assn.
1910 InterFirst Tower
Austin, TX 78701
(512) 477-4452
5,400 members election June
Pres: Bruce Anderson, Anderson Oil Corp., Houston, TX
Exec. VP: Julian G. Martin

EQUIPMENT

Equipment & Tool Institute
1545 Waukegan Rd.
Glenview, IL 60025
(312) 729-8550
65 members election Nov.
Exec. Mgr.: Donn R. Proven

International Carwash Assn./National Carwash Council
4415 Harrison St., Suite 200
Hillside, IL 60162
(312) 449-7430
2,500 members election June
Exec. Dir: R. R. Trantham

National Conference on Weights and Measures
P.O. Box 3137
Gaithersburg, MD 20832
(301) 921-3677
1,500 members election July
Pres: Ernest Ambler, National Bureau of Standards
Exec. Sec: Albert Tholen

The Packaging Institute, U.S.A
20 Summer Street
Stamford, CT 06901
(203) 325-9010
3,000 members election June
Pres: Steve Resina, Resina Automatic Machinery Co., Brooklyn, NY
Exec. Dir: Carol M. Boyle

Steel Tank Institute
666 Dundee Rd., Suite 705
Northbrook, IL 60062
(312) 498-1980
70 members election March
Pres: J. D. Stidham, Chicago Boiler Co., Chicago, IL
Exec. VP: Brian C. Donovan

Truck Trailer Manufacturers Assn.
1020 Princess Street
Alexandria, VA 22314
(703) 549-3010
200 members election May
Pres: Charles J. Calvin

FUEL OIL

Better Home Heat Council
118 Cedar Street
Wellesley Hills, MA 02181
(617) 237-0730
250 members election Sept.
Pres.: Jeffry W. Raynes

Better Home Heat Council of New Hampshire
25 Sea Breeze Lane
New Castle, NH 03854
(603) 436-8424
50 members election Sept.
Chmn: David Duston, Duston Fuel, Hampstead, NH
Pres.: Wilfred H. Hall

Independent Heating Oil Dealers Assn.
446 Powers Bldg.
16 West Main
Rochester, NY 14614
(716) 546-8288
19 members election June
Pres: Samuel Costanza
Exec. VP: Gary Frati

National Assn. of Oil Heat Service Managers
P.O. Box 380
Elmwood Park, NJ 07407
(201) 796-1821
Exec. VP: Charles W. Parliman

New England Fuel Institute
20 Summer Street (Box 888)
Watertown, MA 02272
(617) 924-1000
1,034 members election April
Pres: Charles H. Burkhart

New York Oil Heating Assn.
225 W. 34th St., Room 1202
New York, NY 10122
(212) 695-1380
200 members election June
Pres: Joseph Losquadro, Vijax Fuel, Brooklyn, NY
Exec. VP: James R. Wells

Oil Fuel Institute of Florida
P.O. Box 7729
Orlando, FL 32854
(305) 843-1198
40 members election summer
Pres: Freeman Register, Register Oil & Gas, Starke, FL
Exec. VP: Mark V. Barker Jr.

Oil Heat Institute
5 Franklin Rd., P.O. Box 18
East Greenwich, RI 02818
(401) 885-1301 or (800) 662-5004 toll-free in Rhode Island
98 members election May
Pres: Peter Lombardi Jr., Hy-Test Oil Johnston, RI
Exec. Dir: J. Howard King

Oil Heat Institute of Long Island
601 Veterans Memorial Highway
Hauppauge, NY 11788
(516) 360-0200
200 members election Jan.
Pres: Eugene L. Gazza, HUFCO, Huntington, NY
Exec. VP: Kevin M. Rooney

Oil Heat Institute of Oregon
P.O. Box 42227
Portland, OR 97242
(503) 231-4850
151 members election Sept.
Pres: James H. Coon, Diamond Fuel
Exec. VP: Gregory M. Stewart

Oil Heat Institute
P.O. Box 172
Boise, ID 83701
(208) 344-1152
38 members election Jan. 1987
Pres: Bob Nicholes, EONICO, Caldwell, ID
Exec. VP: Frank Sattler

Oil Heat Institute of Washington
400 Dexter Avenue N.
Seattle, WA 98109
(206) 623-8730
225 members election June 1986
Pres: C. Ben Caley, Pacific Heating Oil Co., Seattle, WA
Exec. VP: C. Edward Bishop

Oil Heat Institute of Upstate New York
100 White Spruce Blvd.
Rochester, NY 14623
(716) 427-2233
45 members election Dec.
Pres: George Wilson, Rogers Fuel, Rochester, NY
Exec VP: Mara Hynes

LP-GAS

National LP-Gas Assn.
1301 W. 22nd St.
Oak Brook, IL 60521
(312) 986-4800
3,800 members election June
Pres: J. Charles Sawyer, Sawyer Gas Co. of Jacksonville, Jacksonville, FL
Exec. VP: J. D. Capps

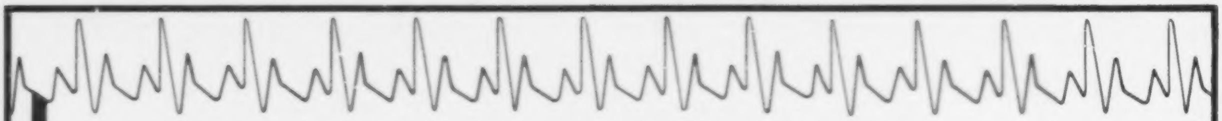
LUBRICATiON

American Society of Lubrication Engineers
838 Busse Highway
Park Ridge, IL 60068
(312) 825-5536
3,700 members election May
Pres: Carleton N. Rowe, Mobile Research and Development Corp., Paulsboro, NJ

Assn. of Petroleum Re-Refiners
600 Water St. S.W.
Washington, DC 20024
(202) 488-8870
100 members election fall
Pres: George T. Booth III, Booth Oil Co., Buffalo, NY
Exec. Dir: James A. McBain Jr.

Independent Lubricant Manufacturers Assn.
1055 Thomas Jefferson St. N.W., Suite 302
Washington, D.C. 20007
(202) 337-3470
230 members election Oct.
Pres: H. Prescott Bagley II, The White & Bagley Co., Worcester, MA
Exec. VP: Nancy DeMarco

National Lubricating Grease Institute
4635 Wyandotte Street
Kansas City, MO 64112
(816) 931-9480
election Oct.
Pres: Robert W. Johnston, Southwest Petrochem Div./Witco Chemical Co., Olathe, KS
Gen. Mgr: Edward J. Palecki



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For Storage Tanks, Trucks, and Racks

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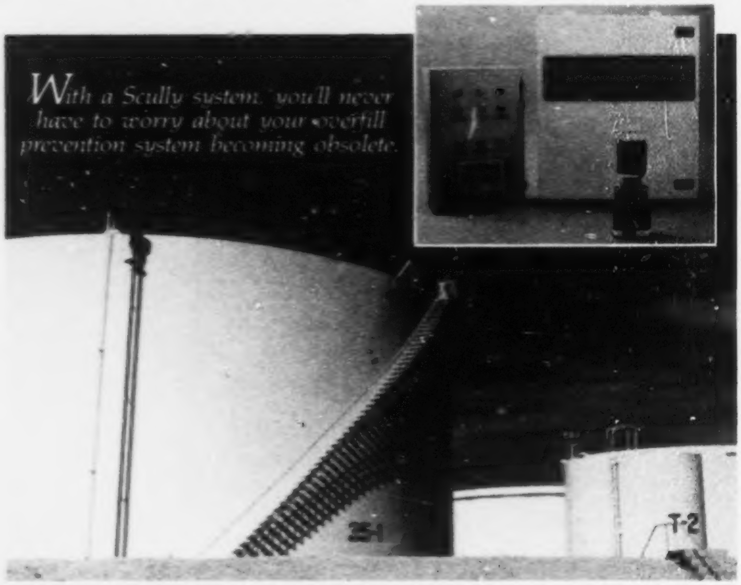

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- Simplest, lowest cost installation

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Scully Electronic Systems, Inc.
70 Industrial Way
Wilmington, MA 01887 USA
(617) 729-7510, Telex 94-7437

RETAIL

National Assn. of Truck Stop Operators
1199 N. Fairfax Street, Suite 801
Alexandria, VA 22314
(703) 549-2100
1,000 members election summer
Chmn: Gene Lindley, State Line Truck Stop, New Paris, OH
Pres: Ronald L. Ziegler

Service Station Dealers of America
400 N. Capitol St. N.W., Suite 175
Washington, D.C. 20001
(202) 393-6868
54 affiliated associations
election Aug.
Pres: Tracy L. Stanton, Tracy's Shell Center, Bexley, OH
Exec. Dir: Vic Rasheed

Assn. of Retail Marketing Services
412 Ocean Ave.
Sea Bright, NJ 07760
(201) 842-5070
300 members election Dec.
Pres: William Karstens, Affiliated Mercantile, Amarillo, TX
Exec. VP: Harry Fellbaum Jr.

TBA/CAR SERVICE

Automotive Exhaust Systems Manufacturers Council
222 Cedar Lane
Teaneck, NJ 07666
(201) 836-9500
5 members election Jan.
Chmn: E. J. Svoboda, Midas-International Corp.
Exec. Dir: Ralph W. Van Demark

Automotive Information Council
29200 Southfield Road, Suite 111
Southfield, MI 48076
(313) 559-5922
625 members election April

Automotive Market Research Council
222 Cedar Lane
Teaneck, NJ 07666
(419) 259-3005
387 members election March
Pres: Karl G. Motter Jr., AP Parts, Toledo, OH
VP: Terrance P. Winslow, Champion Spark Plug, Toledo, OH

Automotive Parts & Accessories Assn.
5100 Forbes Boulevard
Lanham, MD 20706
(301) 459-9110
1,500 members
Pres: Julian C. Morris
Exec. Dir: Liliane Vasseur

Automotive Parts Mfrs. Assn. of Canada
55 York St., Suite 402
Toronto, Ontario, Canada M5J 1R7
(416) 366-9673
350 members election April
Pres: P. J. Lavelle

Automotive Service Industry Assn.
444 N. Michigan Avenue
Chicago, IL 60611-3975
(312) 836-1300
8,500 members election Feb.
Chmn: Robert H. Chilton Jr., The Chilton Companies, Nashville, TN
Pres: John W. Nerlinger

Automotive Warehouse Distributors Assn.
9140 Wark Parkway
Kansas City, MO 64114
(816) 444-3500
828 members election Aug.
Pres: Martin Fromm
Exec. VP: Louis A. Zuanich

Battery Council International
111 East Wacker Drive
Chicago, IL 60601
(312) 644-6610
315 members election April
Pres: Ed Taylor, Daniell Battery, Baton Rouge, LA
Exec. Sec: William W. Carpenter

Brake System Parts Manufacturers Assn.
222 Cedar Lane
Teaneck, NJ 07666
(201) 836-9500
20 members election Feb.
Chmn: James MacGilvray, Brake Parts Co./Div. of Echlin
Exec. Dir: Ralph W. Van Demark

Independent Battery Manufacturers Assn.
100 Larchwood Drive
Largo, FL 33540
(813) 586-1409
291 members
Chmn: Richard B. Bowers, East Penn Mfg. Co., Lyon Stations, PA

International Oil Industry TBA Group
Robert L. Myrick
P.O. Box 2483
Houston, TX 77001
(713) 241-2926
300 members election Oct.
Chmn: L. J. Vielhaver, Cooper Tire & Rubber Co., Findlay, OH

Motor & Equipment Manufacturers Assn.
222 Cedar Lane
Teaneck, NJ 07666
(201) 836-9500
750 members election Dec.
Chmn: Ronald B. Hermann, General Automotive Specialty Co., New Brunswick, NJ
Pres: William A. Raftery

National Automotive Parts Assn.
2999 Circle 75 Parkway
Atlanta, GA 30339
(404) 956-2200
Pres: Bob McKenna

National Automotive Radiator Service Assn.
P.O. Box 267
Harleysville, PA 19438
(215) 256-4246
1,100 members election March
Pres: Dennis Irving, City Radiator Service, Everett, WA
Exec. VP: Charles Eldridge

National Tire Dealers & Retreaders Assn.
1250 I Street N.W., #400
Washington, DC 20005
(202) 789-2300
5,000 members election Sept.
Pres: Harold L. Coker, Coker Tire Co., Chattanooga, TN
Exec. VP: Phillip P. Friedlander Jr.

Tune-Up Manufacturers Institute
222 Cedar Lane
Teaneck, NJ 07666
(201) 836-9500
17 members election Jan.
Pres: F. David Trickey, TRW Inc. Replacement Parts
Exec. Dir: Ralph W. Van Demark

TRUCKING

American Trucking Assns.
2200 Mill Road
Alexandria, VA 22314
(703) 838-1700
election Oct.
Chmn: Dale K. Craig, Craig Transportation Co., Perrysburg, OH
Pres: Thomas J. Donohue

National Tank Truck Carriers
2200 Mill Road
Alexandria, VA 22314
(703) 838-1960

Private Truck Council of America
2202 P Street N.W.
Washington, DC 20036
(202) 785-4900

OTHERS

American Automobile Assn.
8111 Gatehouse Rd.
Falls Church, VA 22047
(703) 222-6334
25-million members election April
Pres: James B. Creal
Man. Dir., Public Affairs: Richard F. Hebert

American Independent Refiners Assn.
114 3rd Street, S.E.
Washington, D.C. 20003
(202) 543-8811
35 members
Pres: Ed Schroeder, Laketon Refinery, Laketon, TN
Exec. Dir: Ray F. Bragg Jr.

American Petroleum Credit Assn.
City Place, Suite 600
730 Hennepin Ave. S.
Minneapolis, MN 55403
(612) 338-7331
400 members election Oct.
Pres: Carl H. Hines, Gulf Oil Products Co.
Exec. Sec.: Donald R. Mosher

American Society for Testing & Materials
1916 Race St.
Philadelphia, PA 19103
(215) 299-5400
29,000 members election Jan.
Chmn: Paul L. Strigner, Nat'l. Research Council of Canada/Fuels & Lubricants Dir.

Assn. of Oil Pipe Lines
1725 K St., N.W. Suite 1205
Washington, DC 20006
(202) 331-8228

Canadian Petroleum Assn.
1500, 633—6th Ave., S.W.
Calgary, Alberta, Canada T2P 2Y5
(403) 269-6721
165 members election March
Exec. Dir: Ian R. Smyth

Highway Users Federation
1776 Massachusetts Ave., NW
Washington, DC 20036
(202) 857-1200
450 corp./assoc. members
election Nov.
Pres. John A. Clements
Exec. VP: Carlton Robinson

Independent Fuel Terminal Operators Assn.
1250 Connecticut Ave N.W.
Suite 800
Washington, DC 20036
(202) 637-9060
16 members election Oct.
Pres: L. P. Steuart II, Steuart Petroleum Co., Washington, DC
Gen. Council: John H. Zentay

Independent Liquid Terminals Assn.
1133 15th St. N.W., Suite 204
Washington, DC 20005
(202) 659-2301
election Nov.
Pres: John Prokop
Dir. of Admin: E. Bruce Calvert

Independent Petroleum Assn. of America
1101 16th St. N.W.
Washington, DC 20036
(202) 857-4700
9,500 members election Fall
Chmn: Jon Rex Jones, Jones Exploration, Houston, TX
Exec. VP: Lloyd Unsell

Mid-Continent Oil & Gas Assn.
711 Adams Office Bldg.
Tulsa, OK 74103
(918) 582-5166
7,600 members election Feb.
Pres: Wayne Gibbens, 1800 K St., N.W., Washington, DC 20006

National Assn. of Convenience Stores
Three Skyline Place
5201 Leesburg Pike, Suite 809
Falls Church, VA 22041
(703) 578-1800
1700 members
Pres: Kerley Leboeuf

National Petroleum Council
1625 K St., N.W.
Washington, DC 20006
(202) 393-6100
Exec. Dir: Marshall W. Nichols

National Fire Protection Assn.
Batterymarch Park
Quincy, MA 02269
(617) 770-3000
32,500 members election May
Pres: Robert W. Grant
VP: Anthony R. O'Neill

National Petroleum Refiners Assn.
1899 L St., N.W., Suite 1000
Washington, DC 20036
(202) 457-0480
300 members election March
Chmn: Mac Jordan, Kerr-McGee Refining Corp., Oklahoma City, OK
Pres: Urvan Sternfels

National Assn. of Tax Administrators
444 North Capitol Street, N.W.
Suite 334
Washington, DC 20001
(202) 624-5890
50 states election June
Pres: Richard Nivens, California State Board of Equalization, Arcadia, CA
Exec. Sec: Leon Rothenberg

Recreation Vehicle Industry Assn.
1896 Preston White Drive
P.O. Box 2999
Reston, VA 22090
(703) 620-6003
526 members election Sept.
Pres./Gen. Council: David J. Humphries

Society of Automotive Engineers
400 Commonwealth Drive.
Warrendale, PA 15096
(412) 776-4841
43,000 members election Feb.
Pres: Elliott A. Green, Lockheed-California Co., Burbank, CA
Exec. VP: Joseph Gilbert

Western Oil and Gas Assn.
727 W. 7th Street, Suite 850
Los Angeles, CA 90017
(213) 627-4866
100 members election Dec.
Pres: Darrell G. Warner, Exxon Company, USA
Exec. VP: Arthur O. Spaulding

■ **Attention Association Executives:** If your association is not currently listed, and you want to be included in the 1986 edition of the *Factbook*, write to: Factbook Editor/Association Listing, 950 Lee Street, Des Plaines, IL 60016

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Marketing Management Personnel

■ACME RETAIL INC.,
dba Handy Pantry Food Stores
P.O. Box 2359
Gastonia, NC 28053-2359
(704) 867-2336
Key: M; Gr
F. C. Roberts Jr., Chmn.
Larry Bryant, Pres.
Gary Billings, VP Planning & Dev.

■ADA RESOURCES
Div. of Adams Resources & Energy, Inc.
P.O. Box 844
Houston, TX 77001
(713) 797-9966
Key: T, M; G, D, L
Subs: Buddy's Stores, Kirbyville Marketing Co.
K. S. Adams, Jr., Chmn.
R. S. Shepherd, Pres.
E. H. Laws, Exec. VP
J. L. Parks, Mgr. Whlsl. Sls.
Lee Beauchamp, Mgr. Products & Pricing
Allan Koerth, Mktg. Acct. Mgr.
David Clark, Credit Mgr.

■AERO OIL CO.
230 Lincolnway East
New Oxford, PA 17350
(717) 624-4311
Key: M; G, F, D, L
Sub. of Phillips Petroleum Co.
N. T. Washburn, Pres.
V. T. Ward, VP
E. G. Higinbotham, VP
C. F. Kaiser, Sec./Treas.
T. T. Washburn, Opns./Svcs. Group Mgr.

■AGWAY PETROLEUM CORP.
P.O. Box 4852
Syracuse, NY 13221
(315) 477-6478
Key: T-Phillips, M-Phillips; G, D, F, L
Sub. of Agway Inc.
Sub: Texas City Ref., Inc.
Robert J. Kutil, Pres.
Ralph D. Fuller, VP Supply & Purch.
Jack Williard, VP Mktg. & Distrib.
W. F. Meckling, Whlsl. Sls. Mgr.
F. Newton, Dir. of Sls.
K. F. C. Suess, Dir. Mktg.
George Puzey, Mktg./Planning Mgr.
K. M. Williams, Mktg. Comm. Mgr.

New England Region
Joel Newman

Central Region
Robert Berkey

Great Lakes Region
Donald Schalk

Penn. Region
Milt Lendl

Atlantic Region
Warren Coleman

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale/retail
F	Fuel Oil, wholesale/retail
D	Diesel, wholesale/retail
LPG	Liquefied petroleum gas wholesale/retail
L	Lubricants, wholesale/retail
w	wholesale only
r	retail only

■AMERADA HESS CORP.
1185 Ave. of the Americas
New York, NY 10036
(212) 997-8500
Key: I; G, F, LPGw, L
Leon Hess, Chmn.
Philip Kramer, Pres. & CEO
H. W. McCollum, Chmn.-Fin. Comm.
Bernard T. Deverin, Exec. VP
R. F. Wright, Exec. VP
A. T. Jacobson, Group VP
Peter A. Dysert, Sr. VP
Neal Gelfand, Sr. VP
Norman Goldberg, Sr. VP
John B. Hess, Sr. VP
W. R. Jameson, Sr. VP
C. H. Norz, Sr. VP
R. K. Stafford, Sr. VP-Fin. & Controller
Seymour R. Miller, Sr. VP
Nathan K. Trynin, Sr. VP
William R. Zimmerman, Sr. VP
G. A. Jamin, Treas.
A. T. Aitkens, VP
Nicholas D. Bernard, VP
Alan A. Bernstein, VP
M. B. Bianchi, VP
Thomas A. Bowman, VP & Auditor
Arthur R. Broadman, VP
J. F. Cassidy, VP
F. L. Clark, VP
T. A. Collins, VP
J. F. Connors, VP
D. W. Cook, VP
George F. Dewhurst, VP
John J. Duggan, VP
Charles J. Dunn, VP
Joseph R. Enloe Jr., VP
Joseph P. Gehegan, VP
Val M. Hebertson, VP
Louis Horvath, VP
W. T. Howard, VP
John J. Koval, VP
Donald Laing Jr., VP
W. S. H. Laidlaw, VP
Philip J. Mazzilli, VP
Robert McReynolds, VP
B. J. O'Bryan, VP
Robert P. Powers, VP
Rene L. Sagebien, VP
R. L. Smernoff, VP
John Steed, VP
D. G. Stevenson, VP
L. A. Stricklin, VP
Carl T. Tursi, VP and Sec.
Andrew Zizinia, VP
J. B. Collins II, Gen. Council
J. Bramhall, VP
A. J. D'Amico, VP
W. J. Dooley, VP
M. J. Klinger, VP
J. Maher, VP
A. Versacci, VP

■AMERICAN PETROFINA INC.
P.O. Box 2159
Dallas, TX 75221
(214) 750-2400
Key: I; G, F, D, LPG, Lw
Sub. of Petrofina, S. A. (82%)
Subs: American Petrofina Marketing Inc.
Finaserve, Inc.
Petcon, Inc.
Porto Fina Oil Co.
P. D. Meek, Chmn. & Pres.
J. L. Thomas, Mktg. VP
R. E. Piner, Asst. Mgr., Distrib. Sls., Eastern Area
D. W. Randolph, Asst. Mgr., Distrib. Sls., Western Area
C. V. Dix, Admin. Mgr.
J. L. Rudeseal, Gen. Mgr., Lube & TBA
F. N. Cox, Lube Oil Sls. Mgr.
J. R. Solomon, TBA Sls. Mgr.
J. W. Boyd, Gen. Mgr., Mktg. Opns.
J. W. Cahill, Jr., Dir., PR
M. J. Couch, VP Supply & Trans.
C. B. Crow, Jr., Mgr., Prod. Supply
J. D. Howell, Gen. Mgr., Ref. Sls.
B. L. Martin, Mgr., Whlsl. Credit

Western Area
Lubbock, TX District
P.O. Box 3886
R. N. Colter, Mgr.

Dallas, TX District
1186 W. Pioneer Pkwy. (Arlington, TX)
S. L. Mullins, Mgr.

San Antonio, TX District
8626 Tesoro Drive
L. E. Wright, Mgr.

Sioux Falls, SD District
4200 S. Louise Ave.
J. D. Houk, Mgr.

Eastern Area
Memphis, TN District
3171 Directors Row
W. W. Malphrus, Mgr.

Atlanta, GA District
2970 Parrott Ave., N.W.
J. E. Payne, Mgr.

Tampa, FL District
P.O. Box 75285
K. W. Harmon, Mgr.

■AMOCO CORP.
200 East Randolph Drive
Chicago, Illinois 60601
(312) 856-5111
Key: I; G, F, D, LPGw, L
Subs: Amoco Oil Co.
Omega Oil Company
L. D. Thomas, Pres.
P. D. Collier, Exec. VP
S. G. Van Sickle, Mktg. VP
J. C. Bergman, Gen. Mgr. Mktg.
T. J. McJoynt, Mgr. Mktg. Enterprises
C. W. Robertson, Mgr. Light Oils
J. A. Stitzell, Adver. Mgr.
R. H. Markley, Mgr. Mktg. Plan. & Eval.

■ANCHOR GASOLINE CORP.
114 E. 5th St.
Tulsa, OK 74103
(918) 584-5291
Key: R, M, O; Gw, Dw
Subs: Canal Refining Co.
Anchor Coal Co.
Cove Petroleum Corp.
Bay Petroleum Corp.
Clear Creek Coal Co., Inc.
Joe R. Wright, Pres.
B. A. Mockley, Exec. VP
E. W. Clopton, VP
C. R. Dupre, VP

■APEX OIL CO.
7930 Clayton Rd.
Richmond Hts., MO 63117
(314) 869-9600
Key: I; G, F, D, LPG, L
Sub: Clark Oil & Refining Co.
Apex Towing Co.
Goldstein Oil Co.
Novelly Oil Co.
Samuel R. Goldstein, Chmn.
P. A. Novelly, Pres.

■ARKANSAS VALLEY PETROLEUM
7213 S. Memorial
Tulsa, OK 74133
(918) 252-0508
Key: M; G, D
Subs: Arkansas Valley Distributing
W. O. Smith, Pres.-CEO
F. H. Sehoeb, Gen. Mgr.

■ARLEX OIL CORP.
275 Massachusetts Ave.
Lexington, MA 02173
(617) 862-3400
Key: M; Fr
John Maloney, Pres.
Wm. Maloney, VP
David F. Eagle, VP

■ARMOUR OIL CO.
P.O. Box 85302
San Diego, CA 92138
(619) 291-1000
Key: T; G, F, D, L
O. B. Armour, Pres.-CEO
L. M. Armour, Exec. VP
H. O. Armour, VP, Mktg.

■TRUMAN ARNOLD COMPANIES
P.O. Box 973
Texarkana, TX 75501
(214) 838-8591
Key: M; G, D, L
Subs: Roadrunner
Truman Arnold, CEO
Gil Arnold, Pres.
Larry Fincher, Exec. VP
Johnny Arnold, Gen. Mgr.
Tony Arnold, Dir. of Stores
Jack Thompson, Dir. Pric. & Supply

■ASAMERA OIL
P.O. Box 118
Denver, CO 80201
(303) 863-7300
Key: R, M; G, F, D, LPG, L
Will Narva, Pres.
Thomas Wood, Sec.-Treas., Controller
Brad Driver, Div. Controller
Robert Humbert, VP Ref.
Thomas Johnson, VP Sup. & Distrib.
Eric Spickelmier, Mgr. Sls.
Don Mullins, Pers. Dir.

■ASHLAND OIL, INC.
P.O. Box 391
Ashland, KY 41114
(606) 329-3333
Key: I; G, D, F, LPGw, Lw
J. R. Hall, Chmn.-CEO
W. R. Seaton, Vice Chmn, Chief Fin. Officer
R. T. McCowan, Vice Chmn., Ex. Aff.
P. W. Chellgren, Sr. VP and Group Oper. Officer
W. C. Voss, Sr. VP, Group Oper. Officer
C. J. Luellen, Sr. VP, Group Oper. Off., and Pres., Ashland Petro. Co.
R. W. Spears, Sr. VP and Group Oper. Officer

ASHLAND PETROLEUM CO.
P.O. Box 391
Ashland, KY 41114
(606) 329-3333
C. J. Luellen, Pres.
R. E. Yancey Jr., Sr. VP, Manu., Crude Supply and Trans.

Light Products Marketing Group
C. R. Lovorn, VP, Ref. Sls.
J. W. Moren, Mgr. Trans. Fuels
R. L. Fulton, Div. Mgr. Atlanta
J. C. Snyder, Div. Mgr., Baltimore
D. R. Davis, Div. Mgr., Cincinnati
H. T. Thompson, Div. Mgr., Chicago
L. H. Dunbar, Reg. Mgr., Cincinnati
F. C. McGrew, Div. Mgr., St. Paul Park

Retail Marketing Group
R. A. Jensen, VP and Pres. of SuperAmerica Stores Div.
R. C. Ball, Admin. Mgr.
G. K. Townsend, VP, SuperAmerica
J. F. Pettus, VP, SuperAmerica

Supply and Transportation
S. S. Watson, Group VP, Sup. & Trans./Asphalt and Indus. Prod.
R. H. Chatfield Jr., VP, Asphalt Mktg.
J. T. McKee, VP, Sup. & Distrib.
D. J. Stender, VP, Trading

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9" Transaction Drawer, Model 67[illegible]

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9" Transaction Drawer, Model 670319.

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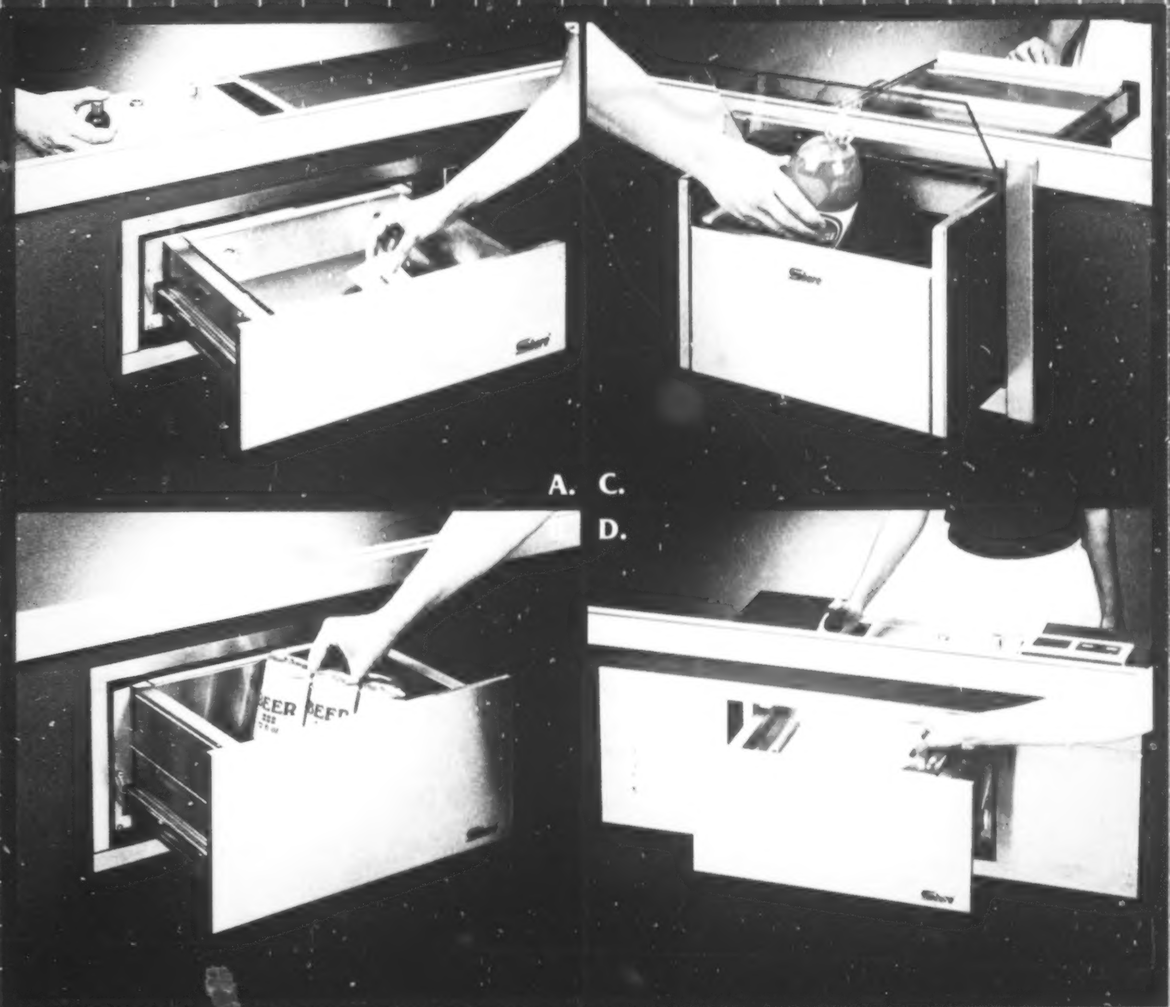

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■ASTROLINE CORPORATION
231 John Street
Reading, MA 01867
(617) 942-1600
Key: M: Gw, Dw, Fw
Herbert A. Sostek, Chmn.
Fred J. Boling Jr., Pres.
Joel A. Gibbs, VP
Richard H. Gibbs, VP
Kenneth B. Monahan, VP
Stephen D. Oppenheim, VP
Wayne Wytrzas, VP
Ed Shub, VP
Richard Sullivan, VP

Astroline Pacific, Inc.
200 Ocean Gate (West Ocean Blvd)
Fifth Floor—Suite 540
Long Beach, California 90802
(213) 437-8997
Jerry Smith, VP

Gibbs Oil Company of Texas, Inc.
7600 West Tidwell—Suite 302
Houston, Texas 77040
John B. Kane, Exec. VP
Bud Hancock, VP

■ATLAS OIL CO. OF UTICA
Riverside Drive
P.O. Box 252
Marcy, NY 13403
(315) 724-7431
Key: T, M; G, D, F
Ronald J. Casatelli, Pres.
Peter J. Casatelli, Mktg. VP

■AUTOMATIC COMFORT CORP.
P.O. Box 777
Hartford, CT 06142-0777
(203) 588-1200
Key: M; G, D, F, L
Subs: Oil Comfort, Inc.
  Gerber Oil Co.
  Petroleum Energy Corp.
  A. C. Fuel Corp.
  ZIP Corp.
  Petro Pantry Corp.
Lewis S. Sheketoff, Pres.-CEO
Ira Kirschner, Treas.-Asst. Sec.
Sidney O. Melius, VP Opns.
Dann S. Foster, VP Mktg. (Gas)
Conrad L. Dwire, Sls. Mgr. Mktg. (Gas)
David A. Duchesne, Data Proc. Mgr.
Leonard F. Schumann, Svc. Mgr.
Joseph T. O'Connor, RFO Sls. Mgr.

■AVALON PETROLEUM CO.
16645 S. Crawford Ave.
Markham, IL 60426
(312) 333-3300
Key: M; G, F, D, L
John Eckenstein, Pres.-CEO
Luke Matic, Gen. Mgr.

■AYERS OIL CO.
4th & Grant Sts.
Canton, MO 63435
(314) 288-4466
Key: M; G, F, D, L
R. E. Ayers, Pres.-Chmn.
J. W. Ayers, First VP
O. L. Tobin, VP, Pet. Mktg. & TBA Mktg.
K. F. Bishoff, VP, Finance
Stephen W. Ayers, Sec.
James Crana, Treas.

■BAGWELL OIL CO., INC.
P.O. Box 136
Onancock, VA 23417
(804) 787-3580
Key: T, M; G, F, D, L
I. W. Bagwell IV, Pres.
I. W. Bagwell III, VP

■E. M. BAILEY DISTRIBUTING CO.
P.O. Box 2576
Paducah, KY 42002-2576
(502) 442-4306
Key: M; G, F, D, L
E. M. Bailey, Pres. & CEO
E. M. Bailey Jr., Exec. VP, Financial
John P. Drew, VP, Purchasing-Whlsl.
Gary W. Robertson, VP Retail-Advtg.

■BALLARD OIL & EQUIP. CO.
P.O. Box 3898-135 Marginal Way
Portland, ME 04104
(207) 772-1991
Howard Sapurley, Pres.
Ilean Caberello, Credit Mgr.
Jud Hazel, Svcs. Mgr.
Wm. Drake, Petroleum-Prod. Sls. Mgr.
Randall Stearns, Equip. Sls. Mgr.

■BATTENFELD GREASE & OIL CORP. OF N.Y.
1174 Erie Avenue, P.O. Box 728
N. Tonawanda, NY 14120
(716) 695-2100
Key: O-Lubricant Manufacturer; Lw
John A. Bellanti, Pres.
Paul P. Converso, VP-Mktg.
Thomas G. Musilli, VP-Technical Svcs.
Florence B. Bellanti, VP of Admin.

■BEACON OIL CO.
525 W. 3rd St.
Hanford, CA 93230
(209) 582-0241
Key: I; G, Fw, D, L
Sub. of Ultramar PLC London, England
David Bacigalupo, Pres.
Walter Dwelle, Sr. VP Mktg.
Joel Mascitelli, Sr. VP, Supply Dist. & Ref.
Lee Lockhart, VP, Admin.
Mark Montevecchi, Controller
William Empey, Advtg.-Public Relations Mgr.
Robert Lowe, VP, Whlsl. Supply
H. P. Smith, VP, Finance
Albert Blair, VP, Ref.
Ronald Nagy, VP, Financial Svcs.
Thomas Sloan, Treas.
Glenn Gaither, Retail Sls. Mgr.

■BELL FUEL CORP.
31st & Grays Ferry Ave.
Philadelphia, PA 19146
(215) 636-3000
Key: M, O-Terminal Operator; Gw, F, D
Subs: Triangle Petroleum Corp.
William Bell, Pres. & CEO
Steven Kujolic, Exec. VP
William A. Selvagn, VP, Mktg.

■BEST OIL CO.
2935 Saw Mill Run Blvd.
Pittsburgh, PA 15227
(412) 884-8777
Key: M; Gr, Dr
Joseph J. McNally, Pres.
Harley W. Pratt, Exec. VP
Edward J. Szlankiewicz, General Mgr.

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Our BT-10 tanks meet UL requirements and are equipped with non-metallic fittings. Surface is coal-tar epoxy coated and equipped with high-potential sacrificial anodes for maximum corrosion protection. They are backed by a 20-year limited warranty.

Buffhide Clad
Our unique Buffhide tanks feature a strong, dense cladding of polyester and glass fiber for positive protection in highly corrosive soils. UL approved, they are all-welded and are fully insulated from the surrounding soil. No cathodic protection is required. Buffhide tanks have been in use for more than 20 years without a reported leak or failure. They are backed by a 30 year warranty on internal and external corrosion and structural failures.

Double-Walled (Secondary Containment)
Buffalo Double Wall tanks are fabricated from carbon steel in accordance with UL specification (and we also can meet New York City requirements). They are easily monitorable by either mechanical or electronic means. Exterior protection systems include Buffhide and BT-10 with applicable warranties.

We also offer a complete range of field-erected tanks, above-ground tanks and accessories. Take advantage of our environmental expertise and let us help you comply.

Buffalo Tank Division
Bethlehem Steel Corporation
Box 2755
Baltimore, MD 21225
(301) 355-1300
1-800-368-2105

■THE BOSWELL OIL COMPANY
2500 Central Trust Tower
4th & Vine Streets
Cincinnati, OH 45202
(513) 421-1200
Key: M; Gw, Fw, Dw

■BRAY TERMINALS, INC.
P.O. Box 956
Glens Falls, NY 12801
(518) 793-8828
Key: M; G, F, D, L
Dana S. Bray Jr., CEO & Pres.
Larry N. King, Exec. VP
Virginia J. Coppola, Sr. VP
Larry DeLuca, Sr. VP

■BRENNAN PETROLEUM CO.
2101 E. Broadway Suite #9
Tempe, AZ 85282
(602) 966-2721
Key: M; Gr, Dr
Affiliated Company: Sun Valley Oil Corporation
Subs: Brenco Stations
Brenco Sweeping Co.
Ted P. Brennan, Pres.
Tim P. Brennan, Treas. CEO
Barbara Pastrano, Sec.

■BROWNING OIL CO.
P.O. Box 808
Bowling Green, KY 42101
(502) 782-2454
Key: M; G, F, D, L
Subs: Tri-County Oil Co.
Rally Marketing Co.
David R. Browning, Pres.
Joe D. Price, Unbranded Sls.

■BURMAH-CASTROL INC.
401 Hackensack Ave.
Hackensack, NJ 07601
(201) 488-1080
Key: M; Lw
Sub. of Burmah Oil Incorporated
Martin J. Donahue, Pres.
Thomas R. Crane Jr., Exec. VP
Ross Fenster, Dir. of Mktg.
John Gardella, General Sls. Mgr.

■DENNIS K. BURKE INC.
284 Eastern Ave.
Chelsea, MA 02150
(617) 884-7800
Key: M; G, Fw, D, L
Subs: Fleetline Petroleum Products
Dennis K. Burke Truck Stops
Dennis K. Burke, Pres.
Edmund Burke, Exec. VP
Walter Leonard, VP, Mktg.
Arthur Dauwer, Gen. Mgr.-Lubes

■BURSAW OIL CORP.
27 Cherry St.
Danvers, MA 01923
(617) 777-0700
Key: M; G, Fr, D, L
Subs: Enon Enterprises, Inc.
Seacoast Petroleum
Wm. J Bursaw Jr., Pres.

■BY-LO OIL CO.
P.O. Box 771
Port Huron, MI 48060
(313) 982-1450
Key: T, M; G, F, D, L
C. S. Lawrence, Pres. & CEO
Craig A. Lawrence, VP, Finance
Charles U. Lawrence, Mktg. VP

■BY RITE OIL CO.
P.O. Box 769, 40600 Grand River
Novi, MI 48050
(313) 477-8887
Key: M; G, F, D, L
Subs: Beacon Oil Co.
Thompson Fuels
N. G. Philpott, Pres.
Cliff Crockatt, VP

■CALIFORNIA TARGET ENTERPRISES, INC.
12739 Lakewood Blvd.
Downey, CA 90242
(213) 927-5339
Key: M; G, D, LPGr, L
Gary Lazar, Pres.
Robert L. French, VP
Darrell K. Fah, Retail Mktg. Mgr.
Grace Leise, Admin. Assist.

■CALUMET REFINING CO.
Div. of Calumet Industries Inc.
14000 Mackinaw Ave.
Chicago, IL 60633
(312) 928-4713
Key: I; Dw, Fw, Lw
S. Mark Salvino, Pres. & CEO
Roger W. Garey, Sr. VP Mktg.
Phillip A. Campbell, Asst. VP Sls.
Jack C. Rech, Princeton Div. Sls.

■CAMPBELL OIL CO.
P. O. Box 558
Massillon, OH 44648
(216) 833-8555
Key: M; G, F, Lw
Subs: Steiner Oil Co., Wooster, OH
C. K. Campbell, CEO
Jack Decker, Exec. VP

■CANNON OIL CORP.
P.O. Drawer 1850
Dothan, AL 36302
(205) 794-2776
Key: M; G, F, D, Lr
Vernon L. Cannon, Pres. & CEO
Paula Weathers, VP
Glenn Cannon, VP
Glenda Williams, Sec.

■CARBO INDUSTRIES
One Bay Blvd.
Lawrence, L. I., NY 11559
(516) 239-2500
Key: M; F, D
Subs: Gibraltar Oil
Hempstead Utilities
Triboro Fuel Oil
Jacob Hochhauser, Bd. Chm.
Paul Hochhauser, Pres.-CEO
James Grimaldi, Mktg. Sls. Mgr.
Ernest Edrich, Equip. Sls. Mgr.

■CARDON CORPORATION
1837 E. Third St.
Tempe, AZ 85281
(602) 967-7691
Key: T, M; G, D, L
Subs: Cardon Oil
Wilford Cardon, CEO
Elijah Cardon, COO
Terry Trendler, VP
Bruce Holbrook, Gen. Mgr.
Loren Rohner, Supply Coord.

■CEL OIL PRODUCTS CORP.
5402 Dutton Ave.
P. O. Box 5123
N. Charleston, SC 29406
(803) 744-2525
Key: T, M; G, D, F
Subs: Gas-Up Inc.
T. H. Albenesius, Pres.
T. H. Albenesius III, VP

■CENEX
P.O. Box 64089
St. Paul, MN 55164-0089
(612) 451-5151
Key: I, T, R, M; Gw, Fw, Dw, LPGw, Lw
Member-Owner: National Cooperative Refinery Assn.
Darrell Moseson, Pres. & CEO
Noel Estenson, Sr. VP, Petro. & Finance
Joel Blake, VP, Petro. Div.
Gerald Morrow, Dir. Petro. Prod. Mktg.

■CENTER INDEPENDENT OIL CO.
R.D. 1
Smock, PA 15480
(412) 677-4408
Key: M; G, F, L
John R. Higinbotham, Pres.
A. D. Higinbotham, Exec. VP
Glenn Knox, Gen. Sls. Mgr.
Delores Moser, Fuel Oil Mgr.
Sophie Capan, Credit Mgr.

■CENTRAL PETROLEUM CO.
548 Standard Bldg.
Cleveland, OH 44113
(216) 771-0400
Key: M; L
Div. of Wyle Laboratories
Subs: Topsail Lubricants
P. T. Webster, Pres.
C. L. Webster, Gen. Mgr.
L. D. Powers, Farm Sls. Mgr.
William Winchester, Mktg. Mgr.
P. T. Webster, Jr., Lubrication Engr.

■CENTURY REFINING CO.
P. O. Box 1197
Kansas City, MO 64141
(816) 968-2900
Key: M; Gw, LPGw
Sub. of Anadarko Production Co., a Panhandle Eastern Co.
W. R. Kesler, Pres.
W. D. Hughes, VP

■CERTIFIED OIL CO.
303 S. Front St.
Columbus, OH 43215
(614) 224-3175
Key: T, M; G, D, F
Carlyle Baker, Chmn. of Board
Dean Walcutt, Pres. & CEO
Michael Auld, Retail Sls. Mgr.
Fred Shato, Whlsle. Sls. Mgr.
Rod Wooley, Mgr. of Trans.

■CHAMPLIN PETROLEUM CO.
Box 7
Fort Worth, TX 76101-0007
(817) 877-6000
Key: R, M; G, Fw, Dw, LPGw
Sub. of Union Pacific Corp.
Subs: Harbor Service Stations, Inc.
W. L. Adams, Pres.
L. W. Marshall, Sr. VP, Manuf. and Mktg.
R. R. Morgan, Gen. Mgr., Mktg.
K. R. Richardson, Mgr., Mkt. Devel.
D. R. Gray, Mgr., Private Brand Mktg.
K. E. Dainton, Mgr., Bulk Sls.
K. M. Jahnke, Mgr., Prod. Supply & Distrib.
S. M. Fuller, Mgr., Prod. Supply
L. B. LeFevre Jr., Mgr., Prod. Distrib.
J. R. Robinson, Mgr. Mktg., Logistics & Eng.
M. L. Bowles, Mgr., Pricing & Special Prod. Mktg.
R. D. Admire, Mgr., Prod. Pricing
E. A. Kerber, Mgr., Special Prod. & Indus. Sls.

■CHANEY OIL COMPANY OF VICKSBURG, INC.
P.O. Box 1353
Vicksburg, MS 39180
(601) 636-2356
Key: M; G, F, D, L
Subs: Dinkins Petroleum Inc.
M. J. Chaney, Pres.
C. Grantham, Treas.
J. W. Doiron, Oper. Mgr.

■CHAPMAN, INC.
P. O. Box 1298
Sherman, TX 75090
(214) 893-8106
Key: M; G
Ellis L. Olmstead, Pres.

■CHARTER MARKETING CO.
P. O. Box 4726
Jacksonville, FL 32232
(904) 350-4082
Key: M; G, D
Sub. of Charter Oil Co.
Joe Leonardo, Pres.
Jim Thompson, Sr. VP, Oper.
Bob Booth, VP, Supply & Trans.
Ron Johnson, VP, Mktg.

■CHEKER OIL CO.
P. O. Box 162
Hazel Crest, IL 60429
(312) 335-0600
Key: M; G, D
J. A. Davidson, Pres.
M. E. Mittleman, VP, Mktg.
H. A. Forshaw, VP, Eng.
W. E. Ott, VP, Fin.

■CHEVRON, CANADA LTD.
1500-1050 W. Pender St.
Vancouver, B.C. Canada V6E3T4
(604) 668-5300
Key: I; G, F, D, LPG, L
G. F. Franciscovich, Pres.
D. R. Kestell, VP, Mktg.
J. D. McMaster, VP, Finance
D. W. Reed, Mktg. & Ref. Mgr.

KEY

I........................ Integrated
T........................ Transporter
R-M............ Refiner-marketer
M........................ Marketer
G........ Gasoline, wholesale/retail
F......... Fuel Oil, wholesale/retail
D...........Diesel, wholesale/retail
LPG.......Liquefied petroleum gas wholesale/retail
L...... Lubricants, wholesale/retail
w................wholesale only
r........................ retail only

■CHEVRON CORPORATION
225 Bush Street
San Francisco, CA 94104
(415) 894-7700
Key: I, T, R, M; G, D, Fw, LPGw, L
Subs: Chevron U.S.A. Inc.
G. M. Keller, Board Chmn.
D. L. Bower, Vice Chmn. of Board
J. R. Grey, Pres.
D. N. Maytum, Sec.
R. E. Willoughby, Treas.
G. R. McGregor, Asst. Treas. & Gen. Credit Mgr.

CHEVRON U.S.A. INC.
575 Market Street
San Francisco, CA 94105
(415) 894-7700
Subsidiary of Chevron Corp.
J. R. Sylla, Pres. & CEO
W. J. Price, Sr. VP, Mfg., Supply & Mktg.
M. M. Smith, VP, Mktg.

Marketing
L. Taigen, Gen. Mgr., Mktg.-Sls.
W. D. Pugh, Gen. Mgr., Mktg.-Field
J. F. McGuire, Mgr., Retail Div.
W. C. Little, Mgr., Reseller Div.
D. W. Callahan, Mgr., Comm. & Indus. Div.
S. V. Drum, Mgr., Aviation Div.
R. G. Congdon, Mgr., Asphalt Div.
H. R. Hammerman, Mgr., Advertising
G. J. Wyllie, Mgr., Mktg. Research
L. L. Day, Mgr., Pricing & Evaluation
H. S. Quillicy, Mgr., Mktg. Planning & Svcs.
A. D. Cornwell, Credit Mgr.

Hawaii Division
1001 Bishop St.
Pauahi Tower
Suite 1000
Honolulu, HI 96813
W. J. Fassler.Mgr.-Sls.
R. M. Airone, Mgr.-Opns.

Northwest Division
1301 Fifth Avenue
Seattle, WA 98101
A. O. Rolseth, Mgr.-Sls.
A. O. Rolseth, Mgr.-Opns.

West Central Division
Two Annabel Lane, Suite 200
San Ramon, CA 94583
T. E. Walter, Mgr.-Sls.
D. Moller, Mgr.-Opns.

Southwest Division
1201 South Beach Boulevard
La Habra, CA 90631
R. B. Larner, Mgr.-Sls.
H. H. Haburn, Mgr.-Opns.

Rocky Mountain Division
Galleria No. Tower II
700 So. Colorado Boulevard
Glendale, CO 80222
A. H. Ward, Jr., Mgr.-Sls.
J. T. Graff, Mgr.-Opns.

Northeast Division
1200 State Street
Perth Amboy, NJ 08861
D. N. Perkins, Mgr.-Sls.
W. B. Wilbourn, Mgr.-Opns.

East Central Division
Starks Building
River City Mall and Muhammad Ali
Louisville, KY 40202
J. J. Whitehead, Mgr.-Sls.
C. C. Frazier, Mgr.-Opns.

Southern Division
340 Interstate North Pkwy.
Suite 200
Atlanta, GA 30339
J. D. Garber, Mgr.-Sls.
J. M. Smith, Mgr.-Opns.

Southeast Division
One N. University Dr.
Plantation, FL 33324
E. O. Smith, Mgr.-Sls.
E. A. Byers, Mgr.-Opns.

Chevron Canada Ltd.
1050 West Pender Street
Vancouver, B.C. V6E 3T4
(604) 668-5300
Sub. of Chevron Corp.
Subs: Furnace Oil Sales Limited
Chevron Asphalt Limited
G. F. Franciscovich, Pres.
D. R. Kestell, VP, Mktg.
K. S. McRae, Mgr., Whlsl. Sls.
R. L. Farbridge, Mgr., Retail Sls.
R. D. Jolly, Mgr., Public Affairs

■W. R. CHILDRESS OIL CO., INC.
P.O. Box 7337
Fort Worth, TX 76111
(817) 834-1901
Key: M; Gw, Dw
Angelia Childress, Pres.
Robin Childress, VP

■CHRISTENSEN OIL CO., INC.
P. O. Box 2186
Green Bay, WI 54306
(414) 437-3257
Key: M; G, D, F
Herb E. Hoeft, Pres.

■CIBRO SALES CORP.
1040 East 149th St.
Bronx, NY 10455
(212) 585-0600
Key: R, M; G, D, F, L
P. James Massa, Pres.-CEO
Peter Cirillo, Sec.
John Cirillo, Treas.
Nicholas W. Cirillo, Exec. VP
William V. Cirillo, VP
F. Candreva, Mgr., Supply & Opns.
G. A. Shaw, Supvr., Marine Opns.
C. Sweet, Mgr., Retail Sls.
Steve Stulic, Whlsl. Sls.
J. Klopstoc, Reg. Mgr., Albany
Don Sanders, Plant Mgr., Albany
P. Gladis, Gen. Mgr., Philadelphia
F. Saccio, Gen. Mgr., L. I.
R. J. Zinser, Mgr. Trading
G. Schiesser, Mgr. Trading

■CIRCLE K CORP.
P. O. Box 20230
Phoenix, AZ 85036
(602) 437-0600
Key: M; Gr, Lr, Dr
Bob Hutchinson, Pres.
Robert Burns, Sr. VP Gasoline Opns.
John Clark, Gasoline Mktg. Mgr.
Don Esperson, Gasoline Facil. Mgr.
Mike Sroda, Gasoline Supply & Distrib. Mgr.

■CITGO PETROLEUM CORP.
P. O. Box 3758
Tulsa, OK 74102
(918) 495-4000
Key: I; G, F, D, LPGw, L
Sub. of The Southland Corp.
Subs.: Citgo Pipeline Co.
Citgo Pipeline Investment Co.
Citgo Caribbean Corp.
Citgo International Supply Co.
Citgo International Trading Co.
R. E. Hall, Pres.-CEO
J. H. Dewell, Sr. VP, Mktg. & Supply
M. A. Johnson, Sr. VP, Ref. & Coord.
M. J. Sedlacek, VP Whlsl. Mktg.
P. E. Luitwieler, VP, Crude Supply
R. J. Carlton, VP, Ref.
R. L. Beers, VP, Lubr. & Spec. Prod.
S. R. Berlin, Gen. Mgr., Fin. Svcs.
W. I. Young, Gen. Mgr., Business & Infor. Sys.
A. L. Sylvester, Gen. Mgr., Prod. Distrib. & Inven. Control
G. C. Lockhart, Gen. Mgr., Prod. Supply & Trad.
H. N. Whitney, Gen. Mgr., Pipeline Opns.
J. E. Thompson, Gen. Mgr., Oper.
C. C. Cormier, Gen. Mgr., Mfg. Svcs.
G. M. Gentry, Gen. Mgr., Eng. & Constr.
R. E. Funk, Gen. Mgr., Lube Oper.
T. G. Richardson, Mgr., Human Resources
R. G. Beck, Mgr., Admin.

■THE COASTAL CORPORATION
Coastal Tower, Nine Greenway Plaza
Houston, TX 77046
(713) 877-1400
Key: I; G, F, D, LPGw, L
Subs: Coastal Refining & Marketing, Inc.
Derby Refining Co.
Pacific Refining Co.
Belcher Oil Co.
O. S. Wyatt Jr., Chmn.-CEO
James R. Paul, Pres.-CEO
F. M. Otto, Sr. Exec. VP, Ref. & Mktg.
K. O. Johnson, Sr. VP, Ref. & Mktg., East of Rockies
D. J. Hill, Sr. VP, Ref. & Mktg., Gulf Coast
A. W. Smith, Sr. VP & Pres. of Belcher Oil Co.

■COAST OIL CO.
4250 Williams Rd.
San Jose, CA 95129
(408) 252-7720
Key: M; G, D, Fw, L
Subs: Barkow Petroleum Co.
Mission Trail Oil Co.
Richard Distributors, Inc.
Coast Oil Stations, Inc.
MT Transportation Co.
Norcal Petroleum Co.
Herbert F. Richards, Pres.
Jerry Cummings, VP, Retail
Royce Andrews, VP, Whlsl.
Jack Kloster, Controller
Judi Naumann, Credit Mgr.

■COEN OIL CO.
P.O. Box 9022
Canton, OH 44711
(216) 452-7944
Key: M; Gw, Dw, F, L
Carlton B. Coen, Bd. Chmn.
Charles R. Coen, Pres.
Donald C. Coen, Sr. VP
Earl L. Coen, VP
Ralph J. Kelly, Gen. Sls. Mgr.
Robert I. Kaschner, Cust. Svc. Coord.

■COLONIAL OIL INDUSTRIES, INC.
P. O. Box 576
N. Lathrop Ave.
Savannah, GA 31402
(912) 236-1331
Key: T, M, O-Liquid Bulk Storage, Coal Sales; G, F, D, L
Subs: Interstate Stations, Inc.
Colonial Interstate, Inc.
Chatham Towing, Inc.
Colonial Terminals, Inc.
Robert H. Demere, Pres.
B. E. Leigh, Exec. VP & Treas.
Robert H. Demere Jr., VP
W. A. Baker Jr., VP Opns.
Shack B. Wimbish Jr., VP Sls.
Andrew J. Cobb, Asst. VP, Retail Fuel Oil
John W. Getty, Asst. VP, D.P. Mgr.
G. Herbert Griffin Jr., Sec. & Credit Mgr.
Raymond S. Demere, Retail Sls. Mgr.
Robert W. Jarrell, Storage Sls. Mgr.

■COMET OIL CO.
P. O. Box 22033
Savannah, GA 31403
(912) 234-5396
Key: M; Gr, Dr
W. A. Winburn III, Pres.
Thomas C. Winburn, Sec./Treas.

■COMMONWEALTH OIL REF. CO. INC.
4005-B Broadway
San Antonio, TX 78209
(512) 828-8444
Key: O-Terminal
Subs: Corco Inc.
Corco International
Corco Oil Co.
Corco Marine
Corco Transportation
Corco Tankers Inc.
Stanford N. Phelps, Chmn.
Richard W. Carpenter, Pres.
Warwick J. Drakeford, Exec. VP

■COMO OIL CO.
2716 W. Superior
Duluth, MN 55802
(218) 722-6666
Key: M-Phillips; G, D, F, LPG, L
Subs: Como Gas Sales
Como Lube & Supply
Como Tire & Battery
Myles Hall, Pres.
Gerald Sher, VP
Larry Everett, LPG Mgr.
L. H. Brown, Treas.
Robert Hall, Sec.

■CONNA CORP.
981 S. Third St.
Louisville, KY 40203
(502) 584-1281
Key: M; G, Dr
Subs: Remote Services, Inc.
Convenient Industries of America
Joe P. Peden, Chmn.
Robert T. Johnson, Pres. & CEO

■CONOCO INC.
(Corporate Offices)
1007 Market Street
Wilmington, DE 19898
(302) 594-3400
Sub. of E.I. Du Pont de Nemours & Co.

Conoco Petroleum Operations
5 Greenway Plaza East
P.O. Box 2197
Houston, TX 77252
(713) 293-1000
Key: I; G, D, F, LPG, L
Subs: Kayo Oil Co.
Douglas Oil Co. of Calif.
C. S. Nicandros, Pres.
E. J. Grivetti, Exec. VP, Explor. & Prod.
D. R. Clark, Exec. VP, Petro. Prod.
O. Newell Jr., Exec. VP, Mlg. Tech.

■CONSUMERS GASOLINE STATIONS INC.
P. O. Box 23309
Nashville, TN 37202
(615) 259-3226
Key: M; Gr, Dr
W. F. Davidson, Pres.
L. C. Morris, VP

■CONSUMERS OIL CORP.
1473 Lamberton Rd.
P. O. Box 8667
Trenton, NJ 08650
(609) 394-8101
Key: M; G, D, F, L
Richard Fineburg, Pres.
Merton Goodall, VP
John Douglas, Gen. Mgr.-Gasoline
William Dillmeier, Gen. Mgr.-Fuel Oil

■CONSUMERS OIL SERVICE INC.
541 Mantua Ave.
Paulsboro, NJ 08066
(609) 423-0010
Key: M; G, D, F, L
James D. Cameron, Pres.

■CONSUMERS PETROLEUM
P. O. Box 546
808 Post Rd.
Fairfield, CT 06430
(203) 259-5211
Key: M; G, F, D, LPG, L
E. Wiehl, Pres.

■CONSUMERS PETROLEUM CO.
13507 Auburn Ave.
Detroit, MI 48223
(313) 272-3800
Key: M; G, F, D, LPG
William Feldman, Pres.
Frank Carroll, Sec./Treas.
Bruce Butzier, Sls. Mgr.

■CONVENIENCE DIVISION, LOEB INC.
(Formerly Top Valu Gasmarts)
400 Industrial Avenue
Ottawa, Ontario K1G 3K8 Canada
(613) 737-1350
Key: M; G, F, D, LPG, L
Sub. of Loeb Inc.
Subs: Provigo Inc.
H. Paul Gobeil, Pres.-COO, Loeb Inc.
William Kipp, Exec. VP, Loeb Inc.
David Guilfoyle, Gen. Mgr. Conv. Div.
Brian Tweedie, Mktg. Mgr. Ottawa
Peter Murray, Mktg. Mgr. Toronto

■COOK & COOLEY, INC.
1701 W. Wardlow Rd.
Long Beach, CA 90810
(213) 549-3161
Key: M; G, Dw
Robert T. Bodamer, Pres.
Sylvia Bodamer, Sec.
Gerald Bodamer, VP
Jack J. Reed, Gen. Mgr.

■CORAL RIDGE CORP.
10615 National Turnpike
Fairdale, KY 40118
(502) 366-1935
Key: M; Gr, Fr, Dr, LPGr, Lr
B. G. Broadhurst, Pres.
Billie Jean Broadhurst, VP

■CORY OIL CO.
Box 21303
Phoenix, AZ 85036
(602) 272-1818
Key: T, M; Gw, Fw, Dw, LPGw, Lw
Phil Cory, Pres.
Karel Overly, Sec.

■CRYSTAL FLASH PETROLEUM CORP.
P.O. Box 584
Indianapolis, IN 46206
(317) 872-6010
Key: M; G, F, D, L
Mac Fehsenfeld, Pres.
Fred Fehsenfeld, VP/Treas.
Frank Fehsenfeld, Chmn.
Lewis Davis, Sec.

■CRYSTAL PETROLEUM CO.
P.O. Box 4180
Corpus Christi, TX 78469
(512) 883-6574
Key: M; G, D, Lw
C. A. Robertson Jr., Pres.
R. M. Carroll, Mgr. Gen. Sls.

■CRYSTAL REFINING CO.
801 N. Williams
Carson City, MI 48811
(517) 584-3157
Key: T, O; Gw, Fw
Marvin Fleischman, Pres.

■C.S.C. OIL COMPANY
P.O. Box 4309
Louisville, KY 40204
(502) 589-5357
Key: M; G, F, Dw, L
Ken Stephens, Pres.
William G. Shepard, Exec. VP
William F. Burbank, Sec.
Gypsy Oak, Controller

■CUMBERLAND OIL COMPANY
7260 Centenial Boulevard
Nashville, Tennessee 37209
(615) 297-8531
Key: T, M, O-Terminals; Gw, Fw, Dw, Lw
John F. Cummins, Pres.
Richard F. Cummins, VP & Gen. Mgr.
V. H. Hunnicutt, Sec.
S. C. Lockett, Mgr., Fuel Oil Sls.
D. V. Harrelson, Mgr., Indus. Oil Sls.
A. Humphrey, Retail Mgr.

■CUNNINGHAM OIL CO.
343 Carswell Ave.
Holly Hill, FL 32017
(904) 253-7621
Key: M; Gw, D, L
Lee C. Culler, Pres.
Jerry Olson, VP, LPG Div.
Bob Thurman, VP

■CURT'S OIL CO.
Box 1759
Muskogee, OK 74402
(918) 682-7888
Key: T, M; G, L
Thurman Curtsinger, Pres. & CEO
David Clark, VP
Bob J. Curtsinger, Sec.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale/retail
F	Fuel Oil, wholesale/retail
D	Diesel, wholesale/retail
LPG	Liquefied petroleum gas wholesale/retail
L	Lubricants, wholesale/retail
w	wholesale only
r	retail only

■**CURTIS PARKER OIL CO. INC.**
P.O. Box 6081
Shreveport, LA 71136
(318) 868-2716
Key: M; Gw, Dw, Lw
B. K. Eaves, Pres. & CEO
Clay G. Eaves, VP, Sls.
Darrell L. Moyer, Opns. Mgr.
Hollis G. Coe, Warehouse Supt.

■**DAIRY MART, INC.**
240 South Rd.
Enfield, CT 06082
(203) 745-1661
Key: M, O-C-Store; Gr
Charles Nirenberg, Chmn. & CEO
Steve Montgomery, Pres.
Laurence D. Handler, Exec. VP
Frank Colaccino, VP
Mitchell Kupperman, VP
Leonard Crogen, VP

■**D & W OIL CO.**
14330 Wyoming Ave.
Detroit, MI 48238
(313) 834-2580
Key: M; F, D, Lw
Charlie F. White, Pres.
Charles A. White, VP
Larry E. Bigelow, VP

■**K E DAVID LTD**
443 Paxson Ave.
Glenside, PA 19038
(215) 886-8900
Key: M; G-Citgo, F, D, L
Ken David, CEO
Kenneth David, Pres.
Kent David, Exec. VP
Fred Casilo, VP, Mktg.
Chas. Kelb, Gen. Sls. Mgr.

■**DAVIS-HOWLAND OIL CORP.**
200 Anderson Ave.
Rochester, NY 14607
(716) 473-6650
Key: O-Lubricants Manufacturer; Lw
Subs: H&W Chemicals
Lawrence R. Klepper, Pres.
Robert Kiely, VP
Anne Vaughan, VP

■**DEAD RIVER CO.**
55 Broadway
Bangor, ME 04401
(207) 773-5841
Key: T, M; G, F, D, LPG, L
Subs: Scott Transportation
  Webber Tanks Inc. (50%)
P. Andrew Nixon, Pres. & CEO
F. M. McClain, VP, Petro.
F. H. Wallace, Gen. Mgr. Reg. 1
A. H. Walton, Gen. Mgr. Reg. 2
W. R. Hamm, Prod. Procurement

■**DEBLOIS OIL COMPANY**
P.O. Box 6027
Providence, RI 02940
(401) 722-8000
Key: M; G, F, D, LPG, L
Subs: Beacon Oil Company
  Petroleum Service Importing Co.
Arthur J. DeBlois Jr., CEO
Robert E. DeBlois, Pres.
David J. Splaine, Sr. VP
Ralston R. Silva, VP, Opns.
Wendell P. Clare Jr., VP, Finance
Arthur J. DeBlois III, VP, Admin.
Stephen J. DeBlois, VP, Sls.
Charles H. DeBlois Jr., VP, LPG
Michael B. Messore, Mgr., Supply
Robert J. Cote, Mgr., Whlsl. Sls.
Ronald W. Josef, Mgr., Motor Fuel Sls.
Bruce K. Smith, Mgr., Heating Oil Sls.
Stanley W. Zuba, Credit Mgr.

■**DESERT COUNTIES OIL**
30370 E. Highway 58
Barstow, CA 92311
(619) 256-8616
Key: T, M, G, D, L
Frank H. Greinke, CEO
Richard Becxtel, Pres.
Donovan Greinke, Exec. VP

■**DESERT OIL, CO.**
P.O. Box 609
Rock Springs, WY 82902
(307) 362-6611
Key: T, M; G, D, L
C. Keith West, Pres. & Chmn.
Charles K. West II, Exec. VP, Whlsl. &
  Gen. Sls. Mgr.
Joe Legerski, Opns. Mgr.
Jim Turano, Trans. Mgr.
Diane Blazovich, Credit Mgr.
Zoanne Henderson, Sec.
Steven P. West, Mktg. VP, Retail

■**DIAMOND INDUSTRIES**
A and So. Heald Sts.
P.O. Box 629
Wilmington, DE 19899
(215) 459-9105
Key: M; G, F, D
Subs: Altemos Fuel Oil Co., Allentown
  Diamond Management
  Diamond Fuel Oil Co.
  Diamond Petroleum Co.
  Diamond Ice & Fuel Co.
  Medford-Dunleavy, Inc.
Stanley W. Mann, Pres. & CEO
Louis Manerchia, Sr. VP
R. Gardner Kahoe III, Esq. Sr. VP
R. T. Wright, VP

■**DIAMOND SHAMROCK REFINING & MARKETING COMPANY**
P.O. Box 20267
San Antonio, TX 78220
(512) 223-2631
Key: R, M; G, Fw, D, LPGw, L
Sub. of Diamond Shamrock Corporation
Subs: Sigmor Retail
  Autotronic Systems, Inc.
  Industrial Lubricants
Riley Epps, Pres.
Dewey Mark, Exec. VP
Ed Prater, VP, Manufacturing
Robert Farmer, VP, Mktg. Group
Kenneth Floyd, VP, Whlsl. Mktg.
Tom Lyons, VP Retail Mktg., Autotronics
Joe Walden, VP Retail Mktg., Sigmor
Jim Jenkins, VP, Industrial Lub.
Lamar Simmons, Zone Mgr., Whlsl.
Dan Engler, Zone Mgr., Whlsl.
Ken Eaton, Zone Mgr., Retail
John McPherson, Zone Mgr., Retail
G. Mayberry, Eastern Div. Mgr., Retail
W. Hilbert, Mgr. Industrial Sls.
Larry Johnson, Mgr. Commercial Sls.
Mike Russell, Mgr. Merchandising &
  Promo.
Gene Smith, Mgr. Jobber
  Communications

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RYKO Manufacturing Company
11600 N.W. 54th Avenue
P.O. Box 38
Grimes, Iowa 50111
(515) 986-3700
TWX (910) 520-2546

■DICKEY INC.
P.O. Box 809
Packwood, IA 52580
(319) 695-3601
Key: T, M; G, F, D, L
Subs: Harold Dickey Transport
  Dickey Dist. Inc.
  Dickey Farms Inc.
Doug Dickey, Pres.
Harold Dickey, VP
Dave Dickey, Sec.
Dan Dickey, Traffic Mgr.
Deb Bemis, Treas.

■DIXIE OIL CO.
Rt. 5, P.O. Box 1067
Tifton, GA 31793
(912) 382-2700
Key: T, M; G, D
W. F. Lindsey, Chmn. Brd.
Bobby B. Lindsey, Pres. & CEO, Sls. Mgr.
Rheudean Denby, VP

■DRAKE'S REFINING STATION
P.O. Box 13129
Lansing, MI 48901
(517) 394-6747
Key: M; Gr, Dr
Subs: Popcorn Planet Inc.
Michael P. Drake, Pres.
Keith Griffes, VP
Daniel G. Vartanian, VP

■EAST COAST OIL CORP.
1420 E. Commerce Rd.
Richmond, VA 23224
(804) 232-2373
Key: M; Gr, Dr
Thos. N. Allen, Chmn.
John M. Steele, Pres. Petro. Div.

■ENGLEFIELD OIL CO.
447 James Parkway
Newark, OH 43055
(614) 928-8215
Key: M; G, F, D, L
Subs: Oil Service Corp.
  Freight Sales Inc.
F. W. Englefield III, Pres.-CEO
Ed Stephens, VP Opns.
F. W. Englefield IV, Admin. VP
Ben Englefield, VP Supply/Trans.
Frank McMannus, VP
Fred Kaseman, CPA
Chuck Pannier, Reg. VP

■ERGON, INC.
Pearl at Lamar
P.O. Drawer 1639
Jackson, MS 39205
(601) 948-3472
Key: I; Dw, Fw, LPG, L
Subs: Lampton Love
  Ergon Refining Co.
  Ergon Exploration Co.
L. B. Lampton, Chmn. & Pres.
R. F. Cox, Sr. VP, Exploration
George D. Ishee, Sr. VP Crude
L. B. Lampton Jr., VP Retail Sls.
Lee C. Lampton, VP, Whlsl. Sls.
J. Everett, Area Sls. Mgr.

Product Terminals:
  Chattanooga, TN 37406
  (615) 266-6723

Greenville, MS 38701
  (601) 332-4849

Memphis, TN 38113
  (901) 775-1247
  Wm. Baker, Area Sls. Mgr.

Mobile, AL 36601
  (205) 438-9891

Vicksburg, MS 39180
  (601) 636-7561

Yellow Creek, MS 38852
  (601) 423-3689

Baton Rouge, LA 70897-3401
  (504) 775-0526

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale/retail
F	Fuel Oil, wholesale/retail
D	Diesel, wholesale/retail
LPG	Liquefied petroleum gas wholesale/retail
L	Lubricants, wholesale/retail
w	wholesale only
r	retail only

■ERICKSON PETROLEUM CORP.
Box 1224
Minneapolis, MN 55440
(612) 830-6700
Key: T, M; Gr
Alfred W. Erickson, Pres.
Ronald A. Erickson, Exec. VP
Dick Mills, VP, Sup. & Distrib.

■ESTE OILS CO.
5556 Vine St.
Cincinnati, OH 45217
(513) 242-5300
Key: M; G, F, L
August J. Albers, CEO
Joseph R. Albers, Pres.
Mike Riehemann, VP, Sls.
Tim Lillie, Gen. Sls.

■EXXON COMPANY, U.S.A.
P. O. Box 2180
Houston, TX 77252-2180
(713) 656-3636
Key: I; G, Fw, D, LPG, L
Sub. of Exxon Corporation
Randall Meyer, Pres.
E. J. Hess, Sr. VP
R. P. Larkins, Mktg. VP
R. T. Harvin, Whlsl. & Ind. Bus. Mgr.
S. M. Pearman, Retail Bus. Mgr.
C. B. Raglin, Planning Mgr.
R. A. Rosenberg, Coord. & Svcs. Mgr.
K. R. Fink, Bus. Devel. Mgr. (Rtl.)
E. F. Arps, Bus. Devel. & Anal. Mgr. (W&IB)
J. S. Dick, Mktg. Tech. Svcs. Mgr.
W. L. Huff, Nat'l. Accts. Mgr.

Retail Business Center
Box 4388
Houston, TX 77210-4388
(713) 591-9100
W. L. Walker, NE Reg. Sls. Mgr.
J. L. Whitehurst, SE Reg. Sls. Mgr.
R. V. Hansen, Western Reg. Sls. Mgr.
J. D. Adkins, CORS Reg. Sls. Mgr.
W. E. Gattis, Real Est. & Eng. Mgr.
R. P. White, Distrib. Mgr.
T. M. Potts, Prod. Distrib. Mgr.
B. L. Conner, Allied Prod. Sls. Mgr.
J. L. Stanislaus, Adver. Mgr.

EBW 660
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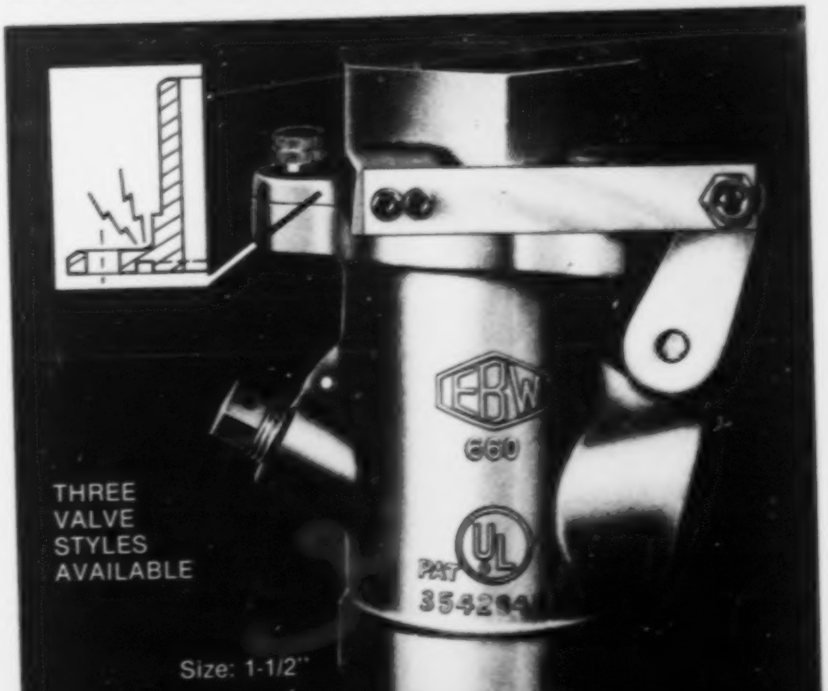

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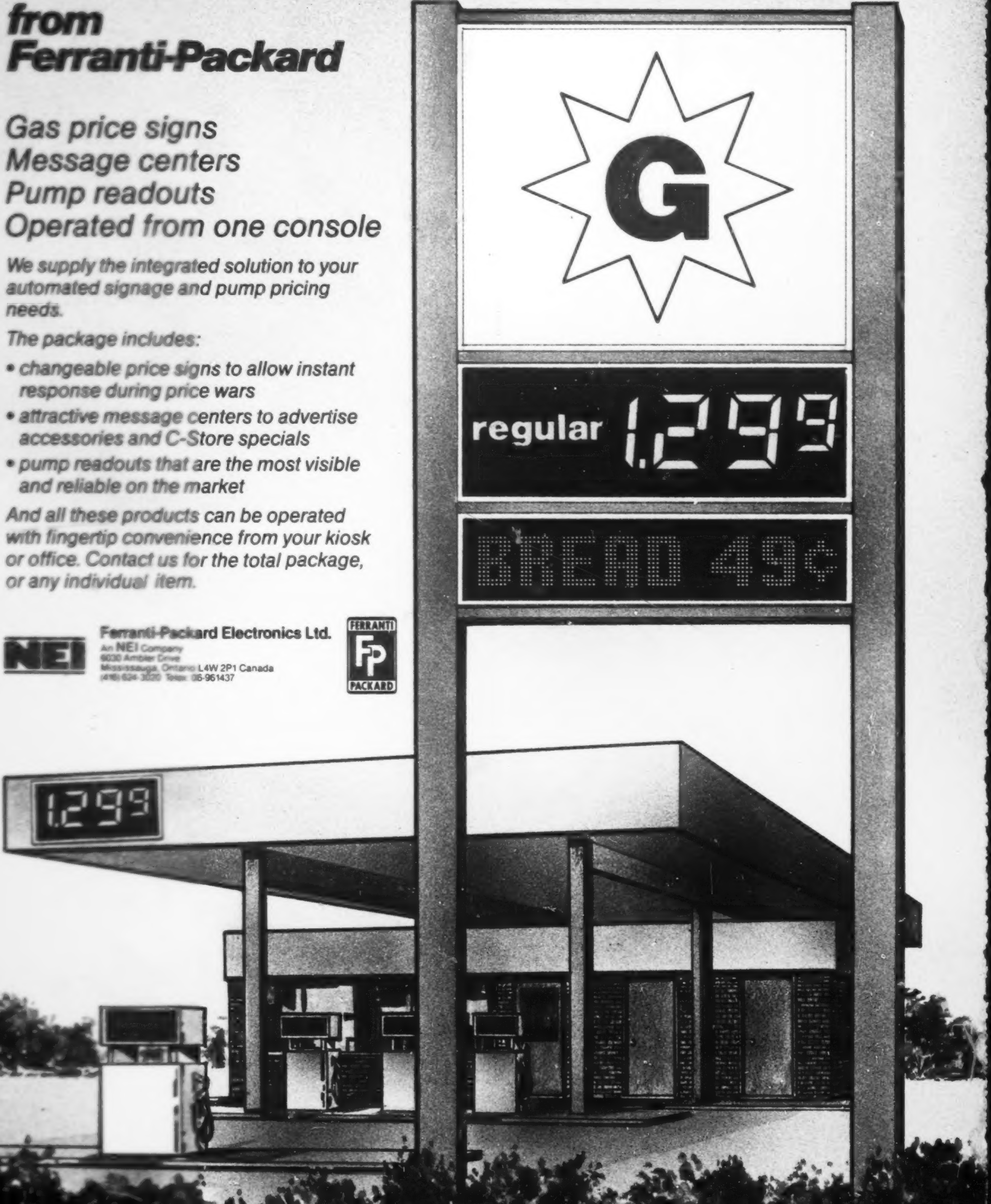

■**FAIRLIE & WILSON CO.**
533 So. 5th St.
Elizabeth, NJ 07206
(201) 354-2100
Key: M; Dr, Fr
Sub: Eastern Fuel Co.
John B. Wade Jr., Pres.-CEO
Richard J. Wade, VP
Walter R. Engel, Sls. Mgr.

■**FARM-OYL CO.**
2333 Hampden Ave.
St. Paul, MN 55114
(612) 646-7571
Key: M, O-Manufacturer; Lw
Robert Larson, Pres.-CEO
Richard Hill, VP, Mktg.
Robert Anderson, Corporate Sec.
Bruce Larson, Corporate Treas.

■**FARMLAND INDUSTRIES**
3315 N. Oak Trafficway
Box 7305
Kansas City, MO 64116
(816) 459-6000
Key: R, M; Gw, Fw, Dw, LPGw, Lw
Sub: Farmland International Energy
K. A. Nielsen, Pres.-CEO
R. H. Wakerfield, VP Petroleum Opns.
J. M. Fenley, VP Refined Fuels
O. N. Shoup, VP NGL, Natural Gas
G. H. Richter, VP TBA/Lubricants

■**FARM STORES**
5800 N.W. 74th Ave.
Miami, FL 33166
(305) 592-3100
Key: T, M; G
Allen S. Fogg, Chmn.
Tim Kitchen, Pres.
R. N. Simon, Mktg. Dir.
S. M. Fogg, VP, Opns.

■**ROBERT FAWCETT & SON CO.**
Tyler Ct.
Cambridge, MA 02140
(617) 547-2360
Key: M; F
Subs: Automatic Heating Service
  Monroe Oil
  Gallagher Oil Co.
  A. W. Nile Co.
Robert R. Fawcett, Pres.
Richard B. Fawcett, Exec. VP
Robert W. Fawcett, Treas.

■**FCX, INC.**
P.O. Box 2419
Raleigh, NC 27602
(919) 828-4411
Key: T, R, M; G, D, F, L, LPG
Jack R. Taylor, Pres. & Gen. Mgr.
Robert Wilcox, VP, Corporate Oper.
Robert Lyford, VP, Chief Financial Officer
Edwin R. Jones Jr., Dir. Petro. Div.
Jerry Senter, Mgr., Petro. Div.

■**FEDERATED CO-OPERATIVES LTD.**
Box 1050
Saskatoon, Sask, Canada S7K 3M9
(306) 244-3311
Key: R, M; G, F, D, L
Sub: Consumers Co-operative Refinery
Wayne Thompson, CEO
Elmer Wiebe, VP, Mktg.
Al Pasloske, Treas.
Al Robinson, Agro Div. Mgr.
Lynn Hayes, Petro. Mktg. Mgr.
Bud Dahlstrom, Refinery Mgr.

■**FIRELINE PETROLEUM INC.**
777 Dedham St.
Canton, MA 02021
(617) 828-4900
Key: M; G, Fw, D
Sub. of Cumberland Farms Inc.
D. B. Haseotes, CEO
R. M. Quinlan, Dir. Petro. Mktg.
Jack Ryan, Dir., Supply & Distrib.
Neil Lawrence, Sup./Dist. Mgr.

■**FISCA OIL CO.**
P.O. Box 3363
Kansas City, KS 66103
(913) 236-7000
Key: M; Gr, Dr
M. R. Hudson, Pres.-CEO
W. M. Van Horn, Exec. VP
Robert Crews Jr., Mktg. VP/Treas.
Arnold A. Allen, Sec.

■**FISKE BROTHERS REFINING CO.**
129 Lockwood St.
Newark, NJ 07105
(201) 589-9150
Key: O-Independent Oil compounder; L
Fred Snyder Jr., Pres.-CEO
John F. Cusack, VP, Gen. Mgr.
Richard McCluskey, Controller

■**FKG OIL CO.**
P.O. Box 122
Belleville, IL 62222
(618) 233-6754
Sub. of Moto, Inc.
V. Kirchoff, Pres.-CEO
C. Parrish, Exec. VP
R. Haase, VP, Purch.
D. Howellman, VP, Opns.
J. Forsyth, Mktg. VP

■**F. O. FLETCHER OIL, INC.**
471 N. Curtis Rd.
Boise, ID 83706
(208) 377-0024
Key: M; G, F, D
Subs: Price-Less Gas, Inc.
  Sav-way, Inc.
Peter L. Hirschburg, Pres.
Andrew A. Frick, VP
Catherine A. Ayers, Gen. Sls. Mgr.

■**FLYING J INC.**
P.O. Box 678
Brigham City, UT 84302-0678
(801) 734-9416
Key: I; G, D, F, LPG, L
Subs: Flying J Travel Plazas
  Flying J Convenience Stores
O. Jay Call, Pres.
J. Phillip Adams, Sr. VP
R. E. Germer, Sr. VP

■**FORTMEYER'S INC.**
P.O. Box 8001
Fort Wayne, IN 46808
(219) 489-3511
Key: I; G, F, L
Howard Fortmeyer, Pres.
Tim Schoenherr, Sec./Treas.
Larry Mayers, Tire Mgr.

■**FOSTER OIL CO.**
36065 Water St.
Richmond, MI 48062
(313) 727-3315
Key: M; G, F, D, L
Richard Foster, Pres. & CEO
Harold McNinch, VP, Distrib.
Thomas Foster, Mgr., Co. Opns.

■**FOUR STAR SERVICE STATIONS**
767 44th St. SW
Grand Rapids, MI 49509
(616) 534-4913
Key: M; Gr, Fr, Dr, Lr
Ray D. Mulliken, CEO
Joanne A. Grubbs, Pres., Sec./Treas.

■**FRANKO OIL COMPANY**
P.O. Drawer 2440
Eugene, OR 97402
(503) 687-9200
Key: T, M; Gr, Dr, Lr
Affiliate: Mid Oil Company
  Jones Transport Co.
Frank Boresek, Pres. & CEO
Ron McPherson, VP, Mktg.
Terry Hillier, Controller
Bob Hought, Asst. VP, Mktg.

■**GARD CORPORATION**
2727 Roe Lane
Kansas City, KS 66103
(913) 236-5000
Key: M; L
Louis Cohn, Chmn. Brd.
Leslie D. Cohn, Pres. & CEO
Jack Cohn, VP, Plant Opns.

■**GARY ENERGY CORP.**
115 Inverness Dr. East
Englewood, CO 80112
(303) 779-3800
Subs: Gary Refining Inc.
Bloomfield Refining Inc.
Key: I; Gw, Fw, Dw
Ron Williams, Pres.
Joe Wann, VP, Supply, Ref. & Mktg.
Tom Bruskotter, Mgr., Supply & Mktg.
Don Hamilton, Dir. of Light Oil Exchange

■**GAS CITY LTD.**
160 S. LaGrange Rd.
Frankfort, IL 60423
(312) 242-6070

■**GASCO GASOLINE INC.**
P.O. Box 1601
Oxnard, CA
(805) 485-9523
Subs: Anchor Refining Co.
  Desert Petroleum Inc.
Key: I; G, Fw, D
William E. Thompson, Pres.
Ben Larner, Exec. VP
Michael L. Saliba, VP
Robert G. van der Valk, Mgr., Supply & Mktg.-Southern District
Patrick W. Barnecut, Mgr., Supply & Mktg.-Northern District

Anchor Refining Co. Inc.
William E. Thompson, Pres.
Michael L. Saliba, VP

Desert Petroleum Inc.
Gary Carson, Exec. VP
John D. Rutherford, Mgr., Mktg. Devel.

■**GAS-N-GO, INC.**
4141 Lake Ave., P.O. Box 2
Ashtabula, OH 44004
(216) 964-6183
Key: M; G, Fw, Dw, L
R. H. Keyes, Pres. & CEO
N. L. Keyes, Sec./Treas.

■**GASTOWN, DIV. OF EMRO MARKETING CO.**
23660 Miles Avenue
Bedford Heights, OH 44128
(216) 475-9212
Key: M; Gr, Fr, Dr, Lr
Sub. of Marathon Petroleum Co.
Ronald Rupp, Pres.
Ike R. Mefford, VP, Mktg.
Robert A. Molinski, VP Controller
Stephen G. Baker, Opns. Mgr.
James Morgan, Sls. Mgr.
William J. O'Neill, Constr. & Devel. Mgr.
John L. Gee, Fast Food Mgr.

■**GATE PETROLEUM CO.**
P.O. Box 23627
Jacksonville, FL 32217
(904) 737-7220
Herb H. Peyton Jr., Pres.
Wayne Levitt, Pres., Gate Mktg.

■**GELBACH PETROLEUM CO.**
Box 157
Valley Park, MO 63088
(314) 225-3601
Key: T, M; G, F, D, LPG, L
Mary Devereauz, Pres.
Bob Ewen, VP., Gen. Mgr.
Gary Stewart, Mktg.
Kathy Folz, Gasoline Sls.

■**GEM PETROLEUM**
8710 E. Broadway
Tampa, FL 33619
(813) 626-2151
Key: M; Gr
Sub. of Shop & Go, Inc.
John Jack, VP
Jim Robinson, Gen. Mgr.

■**GENERAL OIL CO.**
P.O. Box 2336
Batesville, AR 72501
(501) 793-9871
Key: T, M; G, F, D
Subs: General Transport Co.
  Charles Oil Co.
H. Paul Willmuth, Chmn.
Paul Willmuth, Pres. & CEO
Charles Willmuth, VP, Constr.
Andy Moore, Exec. VP
David Moore, Retail VP
R. E. Warner, Whlsl. VP

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale/retail
F	Fuel Oil, wholesale/retail
D	Diesel, wholesale/retail
LPG	Liquefied petroleum gas wholesale/retail
L	Lubricants, wholesale/retail
w	wholesale only
r	retail only

■**GIANT INDUSTRIES, INC.**
7227 North 16th Street, Building A
Phoenix, AZ 85020
(602) 274-3584
Key: R, M; G, D
Divs: Giant Refining Company
  Giant Service Stations
James E. Acridge, Pres. & CEO
Alvis J. Moore, Exec. VP
Robert L. Harvey, VP, Finance
Stephen J. Antol, Treas.
Craig G. Colley, VP, Supply/Mktg.
Ronald S. Williams, VP, Retail Opns.

Giant Refining Co.
7227 North 16th Street, Building A
Phoenix, AZ 85020
(602) 274-3584
Earl Blanchard, VP & Gen. Mgr.
Guy Yates, VP, Mktg.
Vince Ontiveros, Mgr., Prod. Sup.
Renee Papin, Mktg. Rep.
Jim Saxton, Mktg. Mgr.

Giant Refinery—Ciniza
Route 3, Box 7
Gallup, NM 87301
(505) 722-3833
Carl Shook, Opns. Mgr.

Giant Transportation
Route 3, Box 7
Gallup, NM 87301
(505) 722-3833
Jerry Puckett, Mgr.

Giant Service Stations
7227 North 16th Street, Building A
Phoenix, AZ 85020
(602) 274-3584
Terry Crees, Gen. Mgr.
George Armento, Mgr., Goodies Convenience Stores

■**GIFFORD ENERGY CORP.**
58 S. Tyson Ave.
Floral Park, NY 11001
(516) 354-5555
Key: M; F
Melvin Sevin, Chmn.
Al Taule, Pres.
Irik Sevin, VP
Chris English, Branch Mgr.

■**GLOBAL PETROLEUM CORP.**
800 South St.
Waltham, MA 02254
(617) 894-8800
Key: M; Gw, Fw, Dw
Subs: First Petroleum Corp.
  Montello Oil Company
Alfred A. Slifka, Pres.
Richard Slifka, Treas.
Thomas A. McManmon Jr., Sr. VP
Willard S. Poires Sr., VP, Trading & Supply
Arthur D. Katzenberg Jr., Sr. VP, Mktg.
Paul Harwood, VP
Richard B. Salmonsen, VP, Mktg.
Alfred J. Staples Jr., Mgr., Gasoline
Francis P. Sears, Mgr., Residual Fuel

■**GLOBE OIL COMPANY, U.S.A.**
P.O. Box 47546
Doraville, GA 30362
(404) 458-8100
Key: M; G, D
Sub: Starvin Marvin Food Stores
R. Ellis Godshall, Pres.
Robert W. Eaves, Exec. VP
O. Gordon Cope, Exec. VP
Richard L. Langford, VP, Finance
Fred J. Goss, Dir., Mktg.

■**GODWIN OIL CO.**
P.O. Box 1888, 129 Castle Hayne Rd.
Wilmington, NC 28402
(919) 762-0312
Key: T, M-Texaco & Phillips; G, F, D, L
E. P. Godwin III, Pres.
Charles Godwin, VP, Opns. Mgr.
Tom Pearsall, VP, Opns. Mgr.
William C. Godwin II, Sec./Treas., Mgr., Real Estate
Earl Ward, Off. Mgr.
Rex Fountain, Credit Mgr.

■**GOLDEN EAGLE REFINING CO., INC.**
707 Wilshire Blvd., Suite 5200
Los Angeles, CA 90017
(213) 624-7841
Key: I; Gw, Fw, Dw
Sub. of Ultramar PLC
Joel Mascitelli, Sr. VP
Murray Covert, VP
Mike Ayres, Ref. Mgr.

■GOLDEN GATE PETROLEUM CO.
2200 Powell St., Suite 950
Emeryville, CA 94608
(415) 428-2600
Key: T, M; G, F, D, LPGr, L
Subs: Bay Area Petroleum Co.
  Golden Gate Petroleum Int., Ltd.
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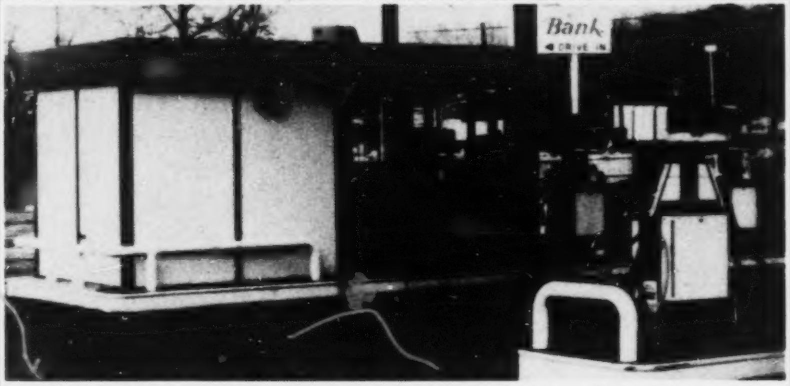

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444 West Ocean Blvd., Suite 510
Long Beach, CA 90802
(213) 590-8553
Mark Speer, Mgr., West Coast Trading

Royal Petroleum, A Division of Triangle Refineries, Inc.
42-20 Vernon Blvd.
Long Island City, NY 11101
(718) 784-6400
H. F. Presley, Gen. Mgr.
John Dalton, Asst. Gen. Mgr.
R. T. Shields, Mgr. Supply & Distrib.
Jack Baird, Sr. Sls. Rep.
Jack Bradley, Sr. Sls. Rep.
Jack Kern, Sr. Sls. Rep.

Syracuse Division
4317 East Genesee St., Room 207
DeWitt, NY 13214
(315) 445-0606
Ron Criss, Sr. Sls. Rep.

Triangle Terminals
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P.O. Box 3249
Oxford, AL 36203
(205) 831-0201

Atlanta Terminal
P.O. Box 47427
Doraville, GA 30362
(404) 457-5258

Birmingham Terminal
P.O. Box 10625
Birmingham, AL 35202
(205) 925-6290

Birmingport Terminal
Route 2
Mulga, AL 35118
(205) 436-3211

Chicago (Bell) Terminal
3741 South Pulaski Rd., Hawthorne Station
Chicago, IL 60623
(312) 254-2211

Chippewa Falls Terminal
P.O. Box 307
Chippewa Falls, WI 54729
(715) 723-2955

Choctaw Point Terminal
P.O. Box 1546
Mobile, AL 36633
(205) 433-1631

Clermont Terminal
P.O. Box 34177
Indianapolis, IN 46234
(317) 291-0430

La Grange Terminal
P.O. Box 180
La Grange, MO 63448
(314) 655-4707

Louisville Terminal
P.O. Box 16188
Louisville, KY 40216
(502) 447-1030

Lynn Park Terminal
Route 2
Cordova, AL 35550
(205) 483-7828

McFarland Terminal
P.O. Box 464
McFarland, WI 53558
(608) 222-3657

Mobile Terminal
P.O. Box 1545
Mobile, AL 36633
(205) 438-4736

Nashville Terminal
P.O. Box 100433
Nashville, TN 37210
(615) 256-2477

Niceville Terminal
P.O. Box 232
Niceville, FL 32578
(904) 678-5159

St. Louis Terminal
P.O. Drawer A, Mehlville Branch
St. Louis, MO 63129
(314) 892-0300

New Hyde Park Terminal
P.O. Box R 116
New Hyde Park, NY 11040
(516) 354-4545

Sewaren Terminal
P.O. Box 98
Sewaren, NJ 07077
(201) 634-3344

Long Island City Terminal
42-20 Vernon Boulevard
Long Island City, NY 11101
(718) 784-6400

■KEY ENERGY ENTERPRISES, INC.
9250 Bay Plaza Blvd.
Suite 320
Tampa, FL 33619
(813) 623-5666
Key: M; G, D, L
Subs: Key Petroleum, Inc.
  Key Food Marts, Inc.
  Keystop, Inc.
  Service Equipment Co. of Tampa
  Key Wholesale, Inc.
  Key Fuelstops, Inc.
B. Mack DeVine, Pres.-CEO
Jerry Lovenworth, Exec. VP-CFO
S. L. Hageman, VP, Admin.
Lawrence J. Keim, Treas.
W. M. "Skip" Borders Jr., VP, Opns.
David Caton, Controller
Mike Hilderbrand, Gen. Mgr., Florida

■KICKAPOO OIL CO., INC.
215 E. Madison St.
Hillsboro, WI 54634
(608) 489-3631
Key: M, O-Transport; G, Fr, Dr, Lr
Sub: J.L. Ray
John Bosshard, Pres.
Wm. Bosshard, VP
David Jenkins, Gen. Mgr.
Geo. Osterhout, Groc. Div. Mgr.
Roger "Buck" Travnick, Flt. Opns.

■KIMBER PETROLEUM CORP.
333 Main Street, P.O. Box 700
Madison, NJ 07940
(201) 377-6000
Key: M; G, D
Warren S. Kimber Jr., Pres.
Barbara R. Kimber, VP
John DeZerga, VP
Carl Braun Jr., VP
Helene Sacharow, Sec.
Mildred Helliring, Treas.
William Price, Asst. Treas.
Warren S. Kimber III, Asst. Sec.

■KIMBRO OIL CO.
P.O. Box 23089
Nashville, TN 37202
(615) 320-7484
Key: M; G, D, F
Harlon J. Kimbro Sr., Chmn.-CEO
Harlon J. Kimbro Jr., Pres.
William C. Kimbro, VP, Gen. Mgr.
David S. Kimbro, Treas.
Margaret M. Solomon, Sec.

■KINGSTON OIL SUPPLY CORP.
N. B'way-P.O. Box 788
Port Ewen, NY 12466
(914) 331-0770
Key: M; G, F, D, LPG, L
Subs: Amos Post Co.
  Paramount Oil Co.
  Motzbro Corp.
Arthur P. Motzkin, Pres.-CEO
Alvin Motzkin, Sec.-Treas.
Joseph W. Benjamin, Pres.-Amos Post
Edward J. Weber, Gen. Mgr.
Barry J. Motzkin, Ad. Mgr.
David G. Motzkin, Eng.

■KIRSCHNER BROS. OIL CO.
569 W. Lancaster Ave.
Haverford, PA 19041
(215) 527-4200
Key: M; G, F, D, L
Michael Kirschner, Pres.
Fred Kirschner, Exec. VP

■KITTIE PETROLEUM, INC.
(Formerly River City Petroleum)
155 So. W.W. White Rd.
San Antonio, TX 78219
(512) 333-2510
Key: M; G, D, L
Dan Linnarty, Pres.
Walter Burnap, Chmn.
B. Max Burleson, VP, Retail
Les Kelly, Mgr., Whlsl. Opns.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale/retail
F	Fuel Oil, wholesale/retail
D	Diesel, wholesale/retail
LPG	Liquefied petroleum gas wholesale/retail
L	Lubricants, wholesale/retail
w	wholesale only
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Keith Forsgren
President
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(316) 832-5500
Key: R, M; Gw, Fw, LPGw
Subs: Koch Refining Co.
Koch Fuels, Inc.

Koch Refining Co.
P.O. Box 43596
St. Paul, MN 55164
(612) 437-0700
Key: R, M; Gw, Fw, LPGw
W. W. Hanna, Chmn.
B. A. Paulson, Pres.
C. R. Swyers, Exec. VP
W. M. Hougland, Exec. VP

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Wichita, KS 67201
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Jeff Shaffer, Sr. VP

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Birmingham, AL 35223
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Long Beach, CA 90802
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Brook House, 113 Park Lane
London W1Y 3AJ
England
011-44-1-409-0121

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Plantation, FL 33324
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Tampa, FL
10014 N. Dale Mabry Hwy., Suite 101
Tampa, FL 33618
(813) 963-1445

Atlanta, GA
340 Interstate No. Parkway
Suite 440
Atlanta, GA 30339
(404) 952-0059

Augusta, GA
501 Greene St., Suite 326
500 Building
Augusta, GA 30901
(404) 724-2331

Oak Brook, IL
711 Jorie Blvd., Suite 250
Oak Brook, IL 60521
(312) 655-1798

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4100 Elm Street
Bettendorf, IA 52722
(319) 359-1304

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2303 So. 3rd Street
Niles, MI 49120
(616) 683-5300

St. Paul, MN
778 Otto Avenue
St. Paul, MN 55102
(612) 228-4600

Springfield, MO
2 Corporate Centre, Suite 100
Springfield, MO 65804
(417) 882-6092

Lincoln, NE
304 South 13th
Lincoln, NE 68102
(402) 476-1284

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P.O. Box 31
Gloucester City, NJ 08030
(609) 456-6673

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Four World Trade Center
New York, NY 10048
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Channelview, TX 77530
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Dallas, TX 75206
(214) 369-3996

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333 Clay St., Suite 1300
Houston, TX 77002
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(804) 282-6735

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2188 King James Drive
Green Bay, WI 54304
(414) 498-1540

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9001 North 76th, Suite 303
Milwaukee, WI 53223
(414) 355-7607

■KOCOLENE OIL CORP.
1725 East Tipton St.
Seymour, IN 47274
(812) 522-2224
Key: M; Fr, Dr, Lr
F. Pat Myers, Chmn.
Robert R. Myers, Pres.
Robert L. Prathers, Exec. VP
Gary F. Myers, Sr. VP

■KRAUSE GENTLE OIL CORP.
Box 537
Hampton, IA 50441
(515) 456-4703
Key: M; G, F
Subs: Soler Transport
Krause Gentle Oil Corp.
North Iowa Oil Co.
Tri-Iowa Oil Co.
Allison Corp.
Chieftain Corp.
T. S. Gentle, Chmn. & Sec.
W. A. Krause, Pres. & CEO
D. D. Van Horn, VP
R. F. Jackson, VP
Keith C. Conover, Controller
T. J. Wollin, Sls. Dir.

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Edina, MN 55436
(612) 920-9373
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James E. Ford, VP
Eugene Lovimen, VP
Dirk P. Vogel, Sec./Treas.
Pat Doubek, Sls. Mgr.

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Hutchinson, KS 67504-1927
(316) 669-8504
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Gary Pfannenstiel, Mktg. Dir.
Rick Krafels, Petro. Dir.
Steve Smith, VP, Opns.
David Cleeves, Real Estate Dir.
Bill Bell, Exec. VP
Clifford Dick, Mgr., Petro. Equip.

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Sub: McMurrey Pipeline
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R. T. Blanchard, Exec. VP
L. B. Gatewood, VP, Manuf.
D. W. Worden, Gen. Mgr., Mktg.
A. N. Bertley II, Gen. Mgr., Supply & Distrib.

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P.O. Box 3352
(501) 945-7115

Seymour, IN 47274
P.O. Box 401
(812) 445-3663
C. L. Basil, Sls. Supv.

Tyler, TX 75701
P.O. Box 840
(214) 595-4511
C. W. Mason, Sls. Supv.
James Gregory, Sls. Rep.

Mobile, AL
808 Downtowner Boulevard
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R. L. Pittman, Sls. Supv.

■LAKESIDE REFINING CO.
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Kalamazoo, MI 49005
(616) 343-1574
Key: T, R, M; Gw, Fw, Dw
Marvin Fleischman, Pres.
Willis E. Perigo, Exec. VP

■LAKETON REFINING CORP.
P.O. Box 1465
Douglasville, GA 30133
(404) 949-3333
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Sub. of Young Refining Corp.
Subs: Trico Pipeline Co.
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John K. Hudson, Exec. VP
Charles E. Young, VP
Joseph P. Rebone, Plant Mgr.

■LAND O' LAKES, INC.
800 53rd Ave. NE
P.O. Box 1395
Minneapolis, MN 55440
(612) 574-7133
Key: I, T, R, M; G, D, F, LPG, L
Subs: Petroleum Resources Co.
Claire Sandness-Chmn.
Ralph Hofstad, Pres.
Duane Halverson, Group VP
Don Kirksey, VP, Mktg.
Larry Burkett, VP, Sls.
Rich Burton, Adv. Mgr.
Lee Morin, Mgr., Refined Fuels
Foster Hemstock, Mgr., LPG
Jeb Vachuska, Mgr., TBA Lubes

■LANDSEA OIL CO.
1671 Reynolds Ave.
P.O. Box 19603
Irvine, CA 92714
(714) 250-0940
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Geuy E. Burghoff, Exec. VP
Morse C. Deming, VP, Supply Mktg.
Robert Gardner, West Coast Supply Coord.
Terry M. Pinney, Gulf Coast Supply Coord.
David Tracht, VP Terminals Opns.

■LANK-COMO OIL CO.
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Fort Lauderdale, FL 33335
(305) 524-7961 Broward
(305) 945-3889 Dade
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William Call, VP, Como Oil Co. & Gen. Mgr., Lank-Como Oil Co.
Jerry Barber, Mgr., Srvc. Dept., Lank-Como Oil Co.
William Lank Sr., Pres., Lank Oil Co.
William Lank Jr., VP, Lank Oil Co.
Rodney Heetland, VP, Lank Oil Co.
William Lank Jr., Gen. Mgr., Lank-Como Oil Co.

■LAWES COAL CO.
Sycamore Ave.
Shrewsbury, NJ 07701
(201) 741-6300
Key: M; Gr, Dr, Fr, Lr
Donald E. Lawes Jr., Pres. & CEO
Donald E. Lawes III, Exec. VP

■CARLOS R. LEFFLER
Box 278
Richland, PA 17087
(717) 866-2105
Key: T, M; G, D, F, L, LPG
Carlos R. Leffler, Pres.
John Byler, Exec. VP
Robert Blecker, Exec. VP
Donald Noll, TBA Mgr.
Patrick Castagna, Admin. VP
Ammon Martin, Sls. Rep.
Dave Morrisey, Credit Mgr.
Michael Bollinger, Mgr., Opns. & Trans.
Paul Hedin, Lube Eng.

■LEHIGH OIL CO. LTD. PARTNERSHIP
One Terminal Way
Norwick, CT 06360
(203) 889-1311
Key: M; Fr, Dr
Thomas Castle, Pres.
Peter H. Castle, VP, Sec.

■J. A. LEONE & SONS
464 Merrimack St.
Methuen, MA 01842
(617) 687-7101
Key: M; Fr
Joseph A. Leone III, Pres. & CEO
Kenneth Leone, Treas.
Donald E. Beote, Credit Mgr.

■LE PAUL OIL CO.
P.O. Box 578
Troy, OH 45373
(513) 335-5631
Key: M; G, D
Frank Shapiro

■LIDO CO. OF NEW ENGLAND
New Zealand Rd.
Seabrook, NH 03874
(603) 474-5551
Key: M; G, D
Carl A. Pescosolido, Pres. & CEO
Wm. B. Pescosolido, VP, Gen. Sls. Mgr.

■LION OIL CO.
1000 McHenry St.
El Dorado, AR 71730
(501) 862-8111
Key: I; G
L. B. Lampton, Pres.
Lee Lampton, Mgr., Whlsl. Sls.
Gerald Williams, Mgr., Sup. & Distrib.

■LITTLE AMERICA REFINING CO.
P.O. Box 1529
Cheyenne, WY 82001
(307) 634-2771
Key: R, M; G, F
R. E. Holding, Pres. & CEO
Don Steuwe, VP, Ref.
M. L. Rensick, Mgr., Fuel Oil & Asphalt

■THE LUBRIZOL CORP. FUEL PRODUCTS GROUP
29400 Lakeland Blvd.
Wickliffe, OH 44092
(216) 943-4200
Key: O-fuel additives
Thomas E. Johnston, Dir.
Joseph E. Gross, Sls. Mgr.
Robert C. Gross, Tech. Mgr.

■LYDEN OIL COMPANY
739 Andrews Avenue, P.O. Box 1854
Youngstown, OH 44501
(216) 744-3118
Key: M; G, F, D, L
W. G. Lyden Jr., Chief Exec. Offc.
William Geoffrey Lyden III, VP
Mark E. Lyden, VP, Sls.
Breen P. Lyden, VP, Sls.

■MACMILLAN RING-FREE OIL CO.
90 Park Ave.
New York, NY 10016
(212) 867-0250
Key: R, M; Gw, F, Dw, L
Subs: Southern Calif. Ref. Co.
Waller Petro. Co.
MacMillan Petroleum (Arkansas) Inc.
Shaheen Natural Resources Co.
John M. Shaheen, Pres. & CEO
Wm. Soudriette Sr., VP
L. F. Marino, VP Mktg.
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Dominick C. Perla, Brand Mgr.

■MAIN BROS. OIL CO.
318 Delaware Ave.
Delmar, NY 12054
(518) 439-7605
Key: M; G, Fr, D, L
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Clark E. Zeh, Exec. VP, Treas.
Ronald Van Ronne, Sls. Mgr.

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Butte, MT 59701
(406) 723-5419
Key: T, M; G, F, D, LPG, L
Thomas F. Kenneally, Pres.
Jim M. Kenneally, VP, Purch.
Dan J. Kenneally, Gen. Mgr.
Kevin Kenneally, Opns. Mgr.

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9009 Center Street
Manassas, VA 22110
(703) 368-3121
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Subs: MIFCO, Inc.
Manassas Frozen Foods
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Harry J. Parrish II, Pres.
Mattie C. Parrish, VP
Frank J. Parrish, VP
Mabel C. Black, Credit Mgr.
Guy A. Guiffre, Controller
Guy P. Anderson, Plant Mgr.
Stanley Fowler, Plant Mgr.

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6820 Charlotte Pike, P.O. Box 22298
Nashville, TN 37202
(615) 352-8180
Key: M; Gr, Dr
Sub. of MAPCO, Inc.
Murl Kennamore, Gen. Mgr.
Noble Cummings, Real Estate Mgr.
James Stickel, Mktg. Mgr.
James R. Webb, Mgr., Admin.

■MAPCO PETROLEUM INC.
P.O. Box 2930
Memphis, TN 38101-2930
(901) 774-3100
Key: R; Gw, Fw, Dw
Sub. of MAPCO, Inc.
R. G. Alexander, VP, Ref.
Larry Smith, Admin. Mgr.
L. G. Diehl, Gen. Mgr., Opns.
J. W. Huggins, Eng. Mgr.

■MARATHON PETROLEUM COMPANY
539 South Main Street
Findlay, OH 45840
(419) 422-2121
Key: R, M; G, F, D, LPGw, L
J. L. Frank, Pres.
G. N. Nicholson, VP, Mktg.
W. E. Lindsey, Pric. & Alloc. Mgr.
W. E. Spears, Real Estate Mgr.
M. J. Kidd, Mgr., Retail Mktg.
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G. R. Fisher, Adv. Mgr., Retail Mktg.
G. L. Cartwright, Related Merch. Mgr., Retail Mktg.
C. E. Browne, Opns. Mgr., Retail Mktg.
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G. S. Wassum, Mgr., Mktg. Opns.
J. McCaffrey III, Prod. Sup. & Distrib. Mgr.
W. E. MacDonald, Lub. & Svcs. Mgr.
R. E. Lodico, Tech. Svcs. Mgr.
G. L. Wieland, Mktg. Engr. Mgr.
A. J. Moorhead, Term. & Transp. Mgr.

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C. E. Pike, Southern Reg. Mgr., Whlsl. Mktg.

Park Ridge, IL 60068
444 North Northwest Highway
R. L. Bell, Northern Reg. Mgr., Whlsl. Mktg.

Southfield, MI 48037
26400 Lahser Road
H. W. Collins, Midwest Asphalt Sls. Mgr., Whlsl. Mktg.

Birmingham, MI 48012
2205 Holland Avenue
A. R. Charnes, Mgr., Detroit Fuel Oil Sls., Retail Mktg.

Champaign, IL 61820
2407 South Neil Street
J. F. Grant, District Mgr., Petail Mktg.

Columbus, OH 43228
4125 Fisher Road
G. A. Risser, District Mgr., Retail Mktg.

Southfield, MI 48037
26400 Lahser Road
W. T. Slade, District Mgr., Retail Mktg.

Indianapolis, IN 46224
1304 Olin Avenue
R. W. Povolock, District Mgr., Retail Mktg.

■MARTIN OIL MARKETING, LTD.
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Alsip, IL 60658
(312) 385-6500
Key: M, O-Blending; G, F, D
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J. Kirkland Greer II, VP, Sup. & Transp.
R. Gene Voyles, VP, Retail Opns.
Thomas A. Floyd, VP, Fin., Treas.

■MAUGER & CO.
38 Springfield Rd.
Aldan, PA 19018
(215) 622-3300
Key: M; G, F, D, LPGr, L
Sub: Simpson Oil Corp.
Clyde A. Mauger Jr., Pres. & CEO
Clyde A. Mauger III, Exec. VP
Phillip Robinson, Treas.

■McCALL OIL & CHEMICAL CORP.
808 S.W. 15th
Portland, OR 97201
(503) 228-2600
Key: M; G, F, D, L
Subs: Great Western Chemical Co. Chemax
R. H. McCall, Pres. & CEO
Jim Wier, VP, Mktg.
Dean Prusse, Supply Mgr.
Jim Charriere, Mgr., Resales Sls.
Fred Caffey, Mgr., Commercial Sls.
Bob McClarey, Mgr., Washington Sls.
Bernie Fisher, Mgr., Terminals

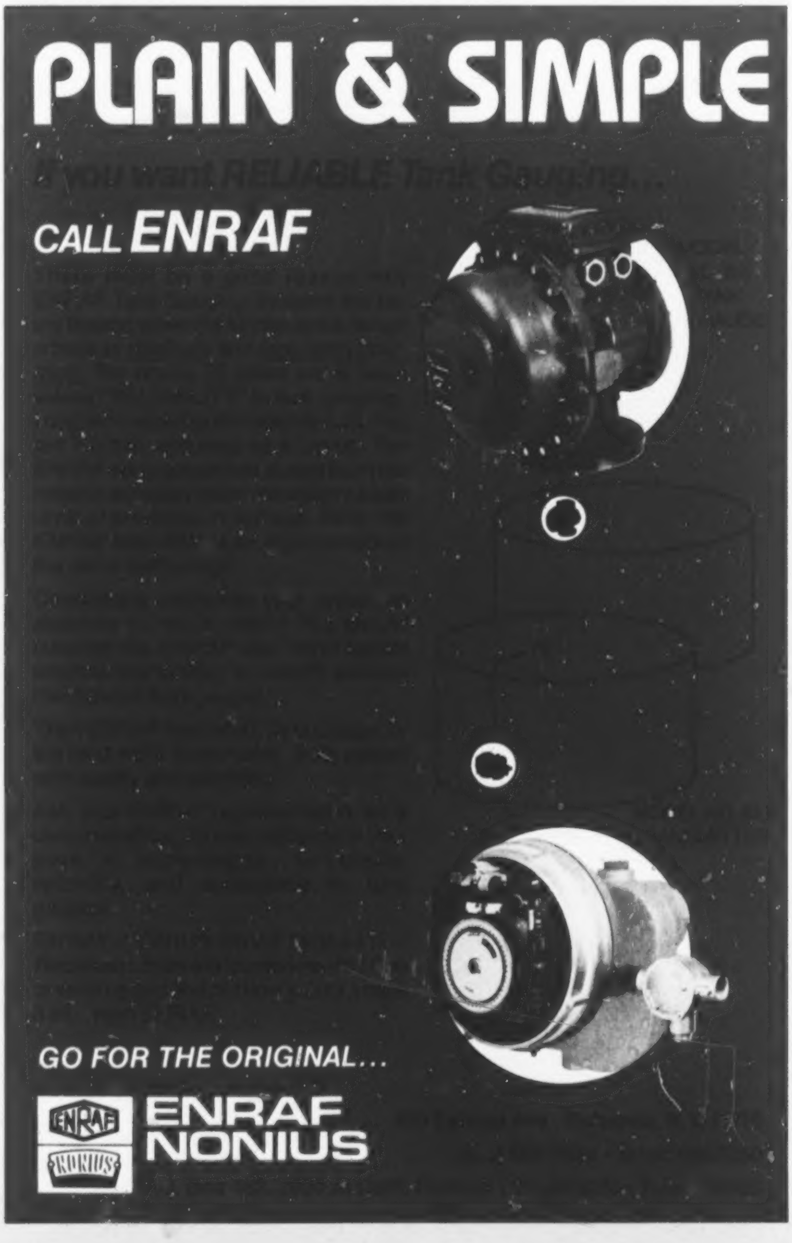
■McDOWELL OIL SERVICE INC.
223 W. 8th St.-P.O. Box 29
Bloomsburg, PA 17815
(717) 784-6691
Key: M; G, Fw, Dw
John L. McDowell III, Pres. & CEO
Larry H. Moss, VP

■McLEIEER OIL, INC.
P.O. Box 2094
Kalamazoo, MI 49003
(616) 343-7677
Key: M; G, F, D, L
Robert McLeieer, Pres.
Peter Buis, VP

■MEENAN OIL CO., INC.
6800 Jericho Tpke. Box 100
Syosset, NY 11791
(516) 364-9030
Key: F, D
William F. Kenny III, Pres.
S. R. Orczyk, VP, Opns.
P. A. Vermylen, VP, Finance

■MERCHANTS OIL
105 S. Cherokee St.
Denver, CO 80223
(303) 733-4627
Key: M; G, D, L
Geo. W. Calkins, Pres.
B. H. Calkins, Exec. VP

■MERCURY OIL CO.
80 Burbank Rd.-P.O. Box M
Wethersfield, CT 06109
(303) 563-0302
Sub. of Northeast Petroleum, Chelsea

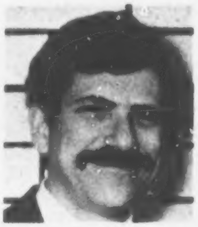


Service Stations and Counter Top Merchandising...

A Profitable Combination!

Kevin Zalak
Owner
Joe's Mobil Station
Centereach, New York

"I started selling candy with the counter top merchandiser. My sales have expanded so much that I now have a complete candy section as well as the counter top display. Impulse sales and profits are still growing and I'm very pleased with the results."



Lew Helfstein
President
Golden Tobacco, Inc.
Hauppauge, New York

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Dan Doran, Personnel Dir.
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G	Gasoline, wholesale/retail
F	Fuel Oil, wholesale/retail
D	Diesel, wholesale/retail
LPG	Liquefied petroleum gas wholesale/retail
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Frank Savini, Majik Mkt.

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Paul C. Bilger, VP, Mfg.
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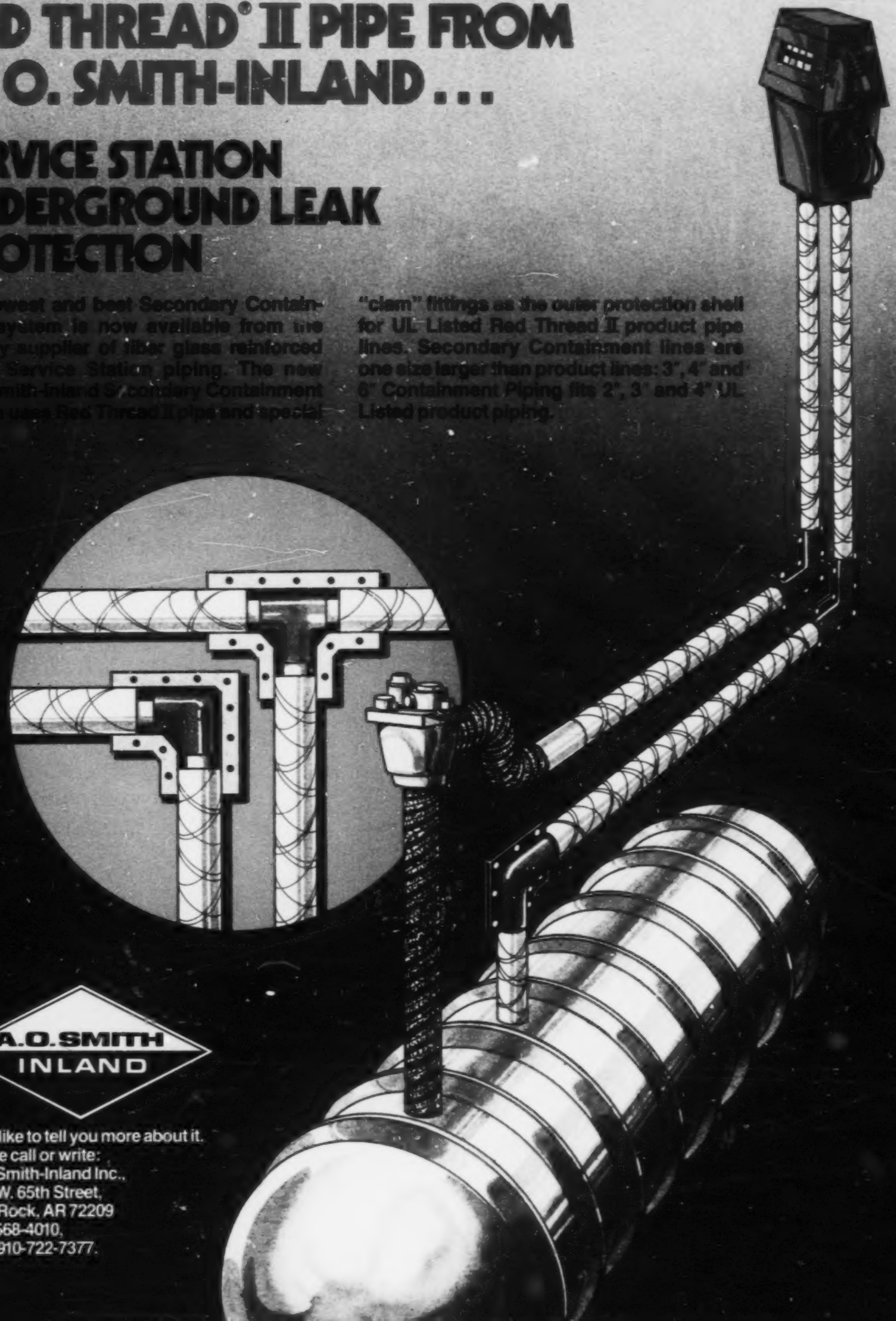

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B. Perry, Export Mgr.

KEY

I.	Integrated
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M	Marketer
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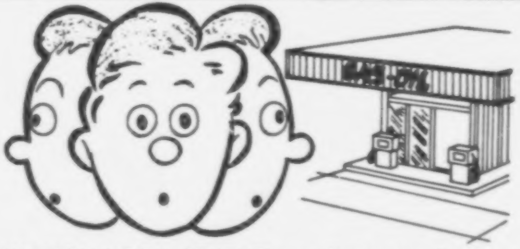

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Charles Worman, Pres.
Phillip Walsh, Exec. VP, Finance
Robert Schmadeke, VP, Mktg., Northern Div.
Jack Scurlock, VP, Mktg., Southern Div.
John Leftwich, VP., Admin.
John Fletcher, Exec. VP, Gen. Counsel

■PETRO-CANADA PRODUCTS INC.
1 Place Ville Marie
Montreal, Quebec H3B 4A9
(514) 876-7200
Key: I; G, F, D, LPG, L
W. A. West, Pres.
R. J. Mayo, Sr. VP, Coord. & Devel.
J. Pantelidis, VP, Mktg., Coord. & Devel.
P. Dupuis, Sr. VP, Eastern Reg.
D. G. Mackenzie, Sr. VP, Central Reg.
W. R. Twiss, VP, Western Reg.
R. C. Legge, Dir., Human Resources

■PETROLEUM HEAT & POWER
Devenport St.
Stamford, CT 06904
(203) 323-2121
Key: M; Gr, Fr, Dr
Malvin P. Sevin, Chmn. Brd.
Irik P. Sevin, Pres.
Justin McCarthy, Sr. VP
Joseph P. Cavanaugh, VP/Controller

■PETROLEUM MARKETERS, INC.
1603 Santa Rosa Rd.
P.O. Box K-64
Richmond, VA 23288
(804) 288-4127
Key: M; G, F, D, L
Subs: Whiting Oil Co. Inc.
Stop In Food Stores Inc.
P.M. Terminals Inc.
P.M. Transport, Inc.
Lynchburg Oil Co. Division
Fuel Oils Division
R. G. Roop, Chmn. & CEO
L. D. Haisley, Pres.
Billie F. Crowder, Sr. VP
David Walsh, VP, Whlsl. Mktg.
Terry M. Phelps, VP, Roanoke Div./Pres., Whiting Oil & Stop In Food
Scott Blankinship, VP
William M. Jackson, Credit Mgr.
Ronald R. Hare, Gen. Mgr., Stop In Food Stores
John W. Smith, VP, Richmond-Lynchburg Div.

■PETROLEUM PRODUCTS CORP.
900 Eisenhower Blvd.
P.O. Box 262
Harrisburg, PA 17015
(717) 939-0466
Key: M; G, F, D, L
Sub: Harrisburg Div: Geo Harney, Term. Mgr.
John A. Arnold, Chmn. & CEO
Paul E Ermlich, Pres. & COO
Donald P. Cook, VP, Whlsl.
Edward Krause, Mgr., Lube Oil Sls.
Tom M. Carper, Credit Mgr.
Anthony F. Minito, Opns. Mgr.

■PETROLEUM SALES & SERVICE
300 Ohio Street
Buffalo, N.Y. 14204
(716) 856-0675
Key: M; G, D
Subs: Buffalo Sylvette Corp.
Sher-Two, Inc.
Service Station Rental
S. Slepian, Pres.
Abraham Slepian, Exec. VP
Joel M. Slepian, VP, Mktg.
Richard Thompson, Treas.
Charles Hoff, Controller

■PETTWAY OIL CO.
3324 Alton Park Blvd.
Chattanooga, TN 37409
(615) 266-4181
Key: I, M; G, F, D, L
William D. Pettway Jr., Pres. & CEO
Vanessa E. Trimble, VP, Admin.
Vivian Lane, Treas.
James C. White, Mgr., Retail Sls.
James C. White Jr., Mgr., Supply & Distrib.
Henry T. Apple, Mgr., Farm Sls.
Thomas F. Hixson, Mgr., Transport Sls.
Jesse P. James, Mgr., Maint. Div.

■PHILLIPS FUEL OIL
432 S. River St.
Hackensack, NJ 07602
(201) 343-6800
Key: T; Gr
James W. Phillips, Chmn.
John S. Hendricks, Pres.
G. Willard Phillips, Exec. VP
Martin A. Becker, VP, Sr. Advisor
Louis Pulda, Sls. Mgr
Carl F. Kopmann, Controller

■PHILLIPS PETROLEUM CO.
Bartlesville, OK 74004
(918) 661-6600
Key: I; G, F, D, LPG, L
Sub: Aero Oil Co.
C. J. Silas, CEO
Glenn A. Cox, Pres.
C. L. Bowerman, VP, Mktg.
W. E. Anderson, Mgr., Retail Mktg.
A. R. Maloney, Mgr., Mktg. Sls. & Svcs.
P. R. Cleek, Gen. Sls. Mgr.
D. A. Johnson, Gen. Sls. Mgr.
J. E. Lewis, Gen. Sls. Mgr.
R. A. Kurland, Mgr., Spec. Prod. Sls.
W. R. Pahmeier, Mgr., Planning & Budgeting
H. D. Schimpf, Mgr., Whlsl. & Supply
D. J. Pasek, Mgr., Adv. & Merchandising
W. P. Buhlinger, Mgr., Lubricants
J. L. Hammond, Mgr., Aviation
J. M. Prentice, Mgr., TBA

Denver Area
9055 E. Tufts Avenue Parkway
Denver, CO 80237
(303) 850-4878
R. H. Bock, Area Retail Mgr.

Tulsa Area
Burning Tree Executive Park, Bldg. 3
8128 E. 63rd St., Suite B
Tulsa, OK 74133
(918) 254-0666
G. S. Page, Area Retail Mgr.

St. Louis Area
P.O. Box 1066
Lakeview Office Center, Suite 308
14500 S. Outer Forty Rd.
Chesterfield, MO 63017
(314) 434-6645
R. A. Harling, Area Retail Mgr.

Dallas Area
2929 N. Central Parkway
Richardson, TX 75080
(214) 690-3872
D. E. Lewter, Area Retail Mgr.

Chicago District
999 Plaza Drive, Suite 215
Schaumburg, IL 60195
(312) 843-0466
J. F. LaRue, Dist. Mgr.

Des Moines District
Regency West
1501 50th Street, Suite 260
West Des Moines, IA 50265
(515) 223-6786
J. K. Rhoades, Dist. Mgr.

Kansas City District
Financial Plaza Bldg. E
6800 College Blvd., Suite 120
Overland Park, KS 66211
(913) 345-8800
J. L. Keller, Dist. Mgr.

Minneapolis District
Northwestern Financial Center
7900 Xerxes Avenue, S-Suite 538
Minneapolis, MN 55431
(612) 835-6600
V. A. Wenzlaff, Dist. Mgr.

Omaha District
Commercial Federal Tower Office
2120 S. 72nd St., Suite 475
Omaha, NE 68124
(402) 392-2157
J. G. Wright, Dist. Mgr.

Shreveport District
3341 Youree Drive, Suite 113
Shreveport, LA 71105
(318) 869-3158
B. A. Likens, Dist. Mgr.

St. Louis District
P.O. Box 1066
Lakeview Office Center, Suite 308
14500 S. Outer Forty Rd.
Chesterfield, MO 63017
(314) 434-6645
R. W. Friedewald, Dist. Mgr.

Amarillo District
3505 Olsen Blvd., Suite 202
Amarillo, TX 79109
(806) 355-6851
L. E. Rapier, Dist. Mgr.

Dallas District
2929 N. Central Expressway
Richardson, TX 75080
(214) 690-3866
W. W. Thomson, Dist. Mgr.

Denver District
9055 E. Tufts Avenue Parkway
Denver, CO 80237
(303) 850-3070
R. B. Houston, Dist. Mgr.

Houston District
6330 W. Loop South, Suite 701
Bellaire, TX 77401
Box 1967, Houston, TX 77001
(713) 660-3663
R. F. Lewis, Dist. Mgr.

Salt Lake City District
P.O. Box 72450
655 E. 4500 South
Salt Lake City, UT 84107
(801) 263-6290
C. L. Hamer, Dist. Mgr.

Tulsa District
Burning Tree Executive Park, Bldg. 3
8128 E. 63rd Street, Suite B
Tulsa, OK 74133
(918) 252-0664
M. N. Harris, Dist. Mgr.

Atlanta District
Box 4033
2965 Flowers Rd. South, Suite 120
Atlanta, GA 30302
(404) 451-1332
W. L. Kearns, Dist. Mgr.

Birmingham District
31 Inverness Center, Suite 345
Birmingham, AL 35243
(205) 967-6266
D. E. Butler, Dist. Mgr.

Clearwater District
51 Main Avenue, Suite 303
Clearwater, FL 33575
(813) 443-6668
L. A. Jensen, Dist. Mgr.

Columbus District
950 W. Wilson Bridge Rd., Suite 280
Columbus, OH 43085
(614) 436-2640
W. N. Tolbert, Dist. Mgr.

Louisville District
10101 Linn Station Rd., Suite 730
Louisville, KY 40223
(502) 426-6650
M. L. Jernigan, Dist. Mgr.

Raleigh District
Box 95174
Texas Instruments Bldg.
2809 Highwoods Blvd., Suite 103
Raleigh, NC 27625
(919) 876-5024
J. R. Downing, Dist. Mgr.

■PIASA MOTOR FUELS INC.
P.O. Box 484
Alton, IL 62002
(618) 254-7341
Key: T, M; G, F, D, L
Robert W. Schrimpf, Pres. & CEO
Donald F. Schrimpf, Exec. VP
S. Wiley Davis, VP, Mktg & Gen. Sls. & Adv. Mgr.

■J. W. PIERSON CO.
89 Dodd St.
East Orange, NJ 07019
(201) 673-5000
Key: M; Fr, Dr
J. W. Pierson, Pres.
Suzenne Davis, VP/Sec.
Jesse Davis, Dist. Sls. Mgr.

■PILOT OIL CORP.
P.O. Box 10146
Knoxville, TN 37919-0146
(615) 588-7487
Key: M; Gr, Fr, Dr
James A. Haslam II, Pres.
James A. Haslam III, VP
William E. Haslam, VP
Rex E. Fox, Treas.
Ronald A. Motley, Mktg. Mgr.

■PIONEER OIL CO. INC.
P.O. Box 18935
Philadelphia, PA 19153
(215) 727-2100
Key: O–Lubricant manuf.; L
Samuel S. Simon, Pres.
Morton Segal, VP
Henry Osborn III, Treas.
John Cunningham, Mktg. VP

■PLACID REFINING CO.
3900 Thanksgiving Tower
Dallas, TX 75201
(214) 741-3081
Key: R, M; Gw, Fw, Dw
Sub. of Placid Oil Co.
C. D. Brown, Pres.
Walter V. Fraker, VP
P. G. Clarke, VP
B. J. Johnson, VP, Land
Feather Wilson, VP, Geol. & Phys.

Port Allen Refinery
P.O. Box 350-B
Port Allen, LA 70767
(504) 387-0278
C. B. Keys, Plant Mgr.

P.O. Box 66421
Baton Rouge, LA 70896
(504) 927-5934

P.O. Box 1146
Tallulah, LA 71282
(318) 574-1290
Ron Hancock, Whlsl. Sls. Rep.

■PORT OIL
1796 Meeting St./P.O. Box 31819
Charleston, SC 29417
(803) 723-3495
Key: T, M; G, Fw, Dw, L
Larry W. Cochran, Pres. & CEO
R. E. Harris, VP, Mktg.
Jesse O. Brown, Reg. Mgr.
Florence A. Morton, Personnel
John G. Misoyianis, Sls. Mgr. Lubr.

■POWER TEST CORP.
175 Sunnyside Blvd.
Plainview, NY 11803
(516) 576-8000
Key: T, M; G, Fw, D, L
Subs: Power Test Pet. Dist.
Power Test of N.J.
P.T. Petro Corp.
Leemilt's Petroleum
Staten Island Gasoline Corp.
Clay Oil Terminals, Inc.
Donna Oil Corp.
Gasway, Inc.
Leo Liebowitz, Pres.
Milton Safenowitz, Exec. VP
Herbert Wechsler, VP, Sls. Mktg.
Geo. DeForest, VP, Real Estate

■PRIDE OF TEXAS DIST. CO.
P.O. Box 1208, 1935 W. Pioneer Parkway
Arlington, TX 76010
(817) 261-2575
Key: M; G, F, D, L
Homer L. McGinnis, Pres.

■PRIDE OIL CO. INC.
P.O. Box 2344
Columbus, MS 39704-2344
(601) 328-7787
Key: T, M; G, F, D
Eddie B. Byars Jr., Pres.
Ralph W. Byars, VP
Elizabeth E. Byars, Corp. Sec.

■PRIDE OIL CO., INC.
5414 Clinton Hwy./P.O. Box 12028
Knoxville, TN 37912
(615) 687-4662
Key: M; Gr, Fr, Lr
Subs: Kelso Oil Co., Inc.
Magnolia Package Store
Andrew J. Gettlefinger, Pres.
Hugh T. Stooksbury, Controller
Paul Lawson, Gen. Sls. Mgr.

■PRIVATE BRAND SERVICES, INC.
1010 S. Mitchell Street
Cadillac, MI 49601
(616) 775-1306
Key: M; G, Fw, Dw
Joseph W. Davy, Pres.
Larry J. Davy, VP
Irene T. Davy, Sec. & Treas.
Lynda Herdegen, Asst. Sec. & Treas

■PUBLIX OIL CO., INC.
2849 Paces Ferry Rd. Suite 160
Atlanta, GA 30339
(404) 436-4335
Key: M; G, F, D, L
Subs: Dalton Oil Co., Inc.
Scotland Oil Co., Inc.
Hay Oil Co., Inc.
Dillon Service Co., Inc.
Publix Distributing Co., Inc.
Tire Distributors, Inc.
Lionel B. Wilde, Pres. & CEO
John A. Keller, VP, Finance
Donald A. Langston, VP, Mktg.
Thomas F. Giles, VP, Sls.

Sales Offices:

Charleston
P.O. Box 30188
25 Folly Road
Charleston, SC 29417
(803) 766-0231
(803) 766-0234
James "Bubber" Frampton, Mgr.

Charlotte
220 Pennsylvania Ave.
Charlotte, NC 28216
(704) 392-1364
Joe Parker, Mgr.

Dalton
130 Cedar Ridge Road
Dalton, GA 30720
(404) 278-8288
Gordon Lawless, Mgr.

Dillon
201 East Main Street
Dillon, SC 29536
(803) 774-8531
Larry Turner, Mgr.

Gainesville
P.O. Box 2437
874 Athens Street Southeast
Gainesville, GA 30503
(404) 532-7031
Don Smallwood, Mgr.

Greenville
P.O. Box 5475, Station B
Rameaur Court
Greenville, SC 29606
(803) 232-5307
Ed Cox, Mgr.

Hickory
P.O. Box 3115
Hildebran Exit of I-40
Hickory, NC 28601
(704) 322-1040
P. C. Ray, Mgr.

Knoxville
5404 Middlebrook Pike
Knoxville, TN 37919
(615) 584-1533
Eddie Phipps, Mgr.

Laurel Hill
P.O. Box 337
Morgan Street
Laurel Hill, NC 28351
Gary Davis, Mgr.

Nashville
P.O. Box 245
Pegram, TN 37143
(615) 763-2869
Elane Dickson, Mgr.

■W. H. PUGH OIL CO.
200 Dodge St.
Racine, WI 53402
(414) 632-4491
Key: M; G, F, D, L
W. H. Pugh Sr., Pres & CEO
W. H. Pugh Jr., VP
Siguid Hegland, Sec.

■PURITY OIL CO.
11306 E. 22nd
Tulsa, OK 74129
(918) 438-1970
Key: M; G, D
Subs: Fastop Stores of Oklahoma, Inc.
Fastop Stores of Arkansas, Inc.
Kenby Oil Company
Robert D. Phillips Jr., Pres. & CEO
Steven D. Cox, VP

■PYRAMID OIL CO.
140 County Rd.
Tenafly, NJ 07670
(201) 568-9630
Key: M; G, F, D
Victor Cinu, Pres.
Glenn Zomack, VP
Charles Waldron, Sls. Mgr.

■QUAKER STATE OIL REFINING
P.O. Box 989
Oil City, PA 16301
(814) 676-7676
Key: I; Gw, Dw, Fw, Lw
Subs: Corn Brothers, Inc.
Quaker State, Inc.
Texstar Automotive Group, Inc.
Truck-Lite Co., Inc.
The Valley Camp Coal Co.
Q. E. Woods, Bd. Chmn. & CEO
R. A. Markle, Pres.
W. Paul Hodges, Exec. VP
W. B. Cook, Exec. VP
J. D. Barry III, Exec. VP
S. A. Julian, Mgr., Nat'l Accts.
A. J. Fischer, Mgr., Fleet/Commercial & Sls. Dept.
D. L. Fisher, Mgr., Auto. Consumer Prod. Dept.
C. J. Shelkey, Mgr., Coatings Dept.
W. E. Kingsley, Mgr., Supply & Distrib.
C. L. Wilbert, Mgr., Export Sls.
R. J. Rossib, Accts. Mgr.
P. F. Petraglia, Adv. Mgr.
T. C. Maxwell, Mgr., Customer Svcs. Dept.
J. P. Pearson, Gen. Mgr., Sterling Oil Div.
T. R. Moore, VP Mktg., Sterling Oil Div.
G. W. Freeman, Opns. Mgr., Sterling Oil Div.
J. N. Campbell, Acct. Mgr., Sterling Oil Div.

Corn Brothers, Inc.
P.O. Box 2397
Smyrna, GA 30081
(404) 799-7212

Texstar Automotive Group, Inc.
9060 Latty Ave.
St. Louis, MO 63134
(314) 521-3900

Quaker State, Inc.
P.O. Box 549
Burlington, Ont., Canada L7M 1T3
(416) 335-5577

■QUALITY OIL CO.
Box 2736
Winston-Salem, NC 27102
(919) 722-3441
Key: T, M; G, F, D, L
J. K. Glenn, Gen. Partner
B. L. Bennett Jr., Gen. Partner
J. K. Glenn Jr., Gen. Partner
Graham Bennett, Gen. Partner
B. R Beck, Sls. Mgr.
J. S. Blackwelder, Credit Mgr.
P. L. Burton, Opns. Mgr.
J. B. Slate, Real Estate & Branch Supvr.
Rocky Nolen, Dir. of Finance
Harry Alexander, Quality Marts
Ernie Rhymer, Purchasing & Real Estate

■QUARLES PETROLEUM
P.O. Box 5249
Fredericksburg, Virginia 22403
(703) 371-2400
Key: M; G, D, Fw
D. E. Quarles Sr., Pres.
D. E. Quarles Jr., CEO
Ben Wafle, Treas.
John McIntyre, Opns. Mgr.
Gary McEntee, Controller
Stuart Fears, Gen. Mgr., Quarles Petroleum, Fredericksburg
Tom Gillespie, VP, Gen. Mgr., Quarles Oil of Warrenton
Thad Green, Gen. Mgr., Quarles Petroleum, Harrisonburg
Wayne Rountree, VP, Mgr., Quarles-Robertson Oil, Fairfax
D. E. Quarles III, Gen. Mgr., Quarles Petroleum, Front Royal
Mike Cason, Gen. Mgr., Quarles Oil of Culpeper

■QUIKTRIP CORPORATION
P.O. Box 3475
Tulsa, OK 74101
(918) 836-8551
Key: M; G, D,
Chester Cadieux, CEO & Pres.
Alvin Howerton, Exec. VP, Opns.
Lloyd Poston, VP, Petro. Opns.
Wyatt Phillips, VP, Mktg.
John Howerton, VP, Store Dvlpmt.
Terry Carter, VP, Finance
Ron Males, VP, Div. Mgr., Oklahoma
Mike Stanford, VP, Div. Mgr., Kansas City
John Scott, VP, Div. Mgr., Kansas
Mike Meroney, VP, Div. Mgr., Iowa

■QUINCY OIL
70 Quincy Ave.
Quincy, MA 02169
(617) 773-2500
Key: M; G, D, F
Sub. of Quinoil Industries, Inc.
Subs: Deepwater Oil Terminals, Inc.
Quincy Oil Service Stations Consolidated, Inc.
W. R. Prang, Pres. & CEO
William G. Kiniry, VP, Gen. Mgr.
Robert P. Melchin, VP, Chief Fin. Off.
Louis J. Bagley, Credit Mgr.

■QUORTRUP PETROLEUM CO.
P.O. Box 672
Carrollton, TX 75006
(214) 243-4854
Key: M; G, D, L
W. H. Quortrup, Pres. & CEO

■RACETRAC PETROLEUM, INC.
2625 Cumberland Parkway, N.W.
Suite 100
Atlanta, GA 30339
(404) 434-0400
Key: M; G, D
Carl Bolch Jr., CEO & Pres.
Max Lenker, VP, Purchasing
Robert Stier, VP, Sls. Mgr.
Jeff Bachman, VP, Constr.
Richard Peoples, VP, Eng.
Bob Dumbacher, VP, Fin.

■RALLY OIL CO., INC.
P.O. Box 1017
Melville, NY 11747
(516) 423-3030
Key: M; G, D
Sub. of Tartan Oil Corp.
Barry Tallering, Pres. & CEO

■RED HEAD OIL
Irvine Rd.
P.O. Box 787
Richmond, KY 40475
(606) 623-6705
Key: M; G, F, L, D
Alex Fassas, Pres. & CEO
Phil Montgomery, Mktg. Mgr.
Tom Fassas, Dir. Purchasing

■REDWING CARRIERS, INC.
P. O. Box 30063
Tampa, FL 33630
(813) 621-2046
Key: T
K. Charles Elliott, Pres.
David Fulkerson, VP Admin.
Bill Wimble, Exec. VP

■REINAUER PETROLEUM CO.
101 E. Broadway, Box 66
Hackensack, NJ 07601
(201) 489-9700
Key: M; G, D
B. Franklin Reinauer II, Chmn. & CEO
B. Franklin Reinauer III, Pres.
Robert J. Dydo, VP
Anthony Schiavino, Gasoline Sls. Mgr.

■REINHARDT OIL CORP.
P.O. Box A
West Oneonta, NY 13861
(607) 432-6633
Key: M; G, F, D, LPG, L
Subs: Reinhardt-Andrus Co.
B Z Bee Foods
Robert E. Seng, Pres. & CEO
Rudy Ballard, Exec. VP
Dave Harder, Gen. Mgr., Fuel Oil Sls.

■RELIANCE UTILITIES
477 West John St.
Hicksville, L.I., NY 11802
(516) 931-6800
Key: M; Fr
Malvin Sevin, CEO
Erik Sevin, Pres.
Larry Caputo, Gen. Mgr.

■REMOTE SERVICES, INC.
P.O. Box 35580
Louisville, KY 40232
(502) 584-1281
Key: M; Gr
Sub. of CONNA Corporation
Sub: Convenient Gasoline Inc. (NY)
G. E. Wagner, Pres.
C. A. Reinhardt, No. Reg. Sls. Mgr.
William L. Jessie, So. Reg. Sls. Mgr.
M. S. Winner, Opns. Mgr.
Sally R. Brady, Mgr., Supply & Distrib.

■REPUBLIC OIL CORP.
22514 Ventura Blvd.
Woodland Hills, CA 91364-1464
(818) 888-7532
Key: M; G, D
Sub: Dixxie Diesel Truck Stops
Richard A. Baldinger, Pres. & CEO
J. T. Helsom, Exec. VP & Sec.

■REX OIL CO. OF FLORIDA
12314 Plantation Lane
North Palm Beach, FL 33408
(305) 694-0359
Key: M; G
Jerry M. Porter, Pres.
Jerry M. Porter Jr., VP

■REYNOLDS INDUSTRIES, INC.
33 Mt. Auburn St.
Watertown, MA 02172
(617) 924-4650
Key: M; G, D, Fr, LPGr
Subs: Port Oil Corp.
Port Oil Corp. Northeast
Philip L. Reynolds, Pres.
David G. Reynolds, VP

■R.I. MARKETING, INC.
8500 Georgetown Rd.
Indianapolis, IN 46268
(317) 875-8500
Key: M; Gr, Fr, Dr, Lr
Michael Dellen, Pres.
W. B. Conner, Exec. VP
Richard Jones, VP
Dallas Simon, VP

■RIVER OIL CO.
1550 Channel Ave.
Memphis, TN 38113
(901) 948-8538
Key: M; Dw, Gw
Sub: River Oil Company of Jackson (TN)
James L. Fri Jr., Pres.
Richard L. Jacobs, Pres., River Oil Co. of Jackson

■F. L. ROBERTS & CO., INC.
P.O. Box 1964
Springfield, MA 01020
(413) 781-7444
Key: M; G, Fw, D, L
Abbott S. Roberts, Chmn.
Steven M. Roberts, Pres.
John J. McGirr, Sr. VP
A. Seth Roberts, VP
Joseph F. Maggi, VP

Phillip Palma, Phil's Texaco, Canoga Park, California

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P.O. Box 21503
Department NPN685
Phoenix, Arizona 85036

■ROBINSON OIL CO., INC.
4250 Williams Rd.
San Jose, CA 95129
(408) 255-9531
Key: M; G, D
Subs: Mission Trail Oil Co.
M T Transportation, Inc.
Donald L. Robinson, Pres.
Thomas L. Robinson, VP
Gerald C. Cummings, Retail Mgr.
John E. Kloster, Controller

■ROCK ISLAND REFINING CORP.
P.O. Box 68007
Indianapolis, IN 46268
(317) 872-3200
Key: R, M; G, D, Fw, LPGw
Subs: Rock Island Resource Co., Inc.
R. I. Marketing, Inc.
W. E. Huff, Pres.
F. W. Grube, Exec. VP
J. P. Hofer, VP, Fin.
J. E. D. Boudler, Mgr. Whlsl. Sls.
D. L. Musolino, Mgr., Nat'l Accts.
J. O. Davis, Public Rel. Mgr.

■ROCKET OIL CO.
P.O. Box 9022
Canton, OH 44711
(216) 452-7945
Key: M; Gw
Donald C. Coen, VP

■ROSS RESOURCES, INC.
310 West Central, Suite 121
Wichita, KS 67202
(316) 264-6113
Key: M; G, D, Lr
Ron R. Ross, Pres.
James T. Ross, VP

■RYAN-DeWITT CORP.
4088 Pearl St. Rd., P.O. Box 191
Batavia, NY 14020
(716) 343-4444
Key: M; G, F, D, L
Subs: Albion Oil Co., Inc.
L. W. Stroup Corp.
Neil T. Burns, Pres.
Elsie F. Ryan, Sec.-Treas.
Richard Howard, VP, Sls.
Lewis Grass, VP, Opns.
J. A. Tresco, Comptroller

■SAHARA OIL CO., INC.
P.O. Box 6574
Phoenix, AZ 85005
(602) 253-2159
Key: M; G, D
Robert L. Ragel, Pres.

■SAN ANN SERVICE
P.O. Box 618
Boaz, AL 35957
(205) 593-5286
Key: M; D
Joh Britton, Mgr.

■SANTA FUEL INC.
154 Admiral St.
Bridgeport, CT 06605
(203) 367-3661
Key: M; F
Subs: Buckley Energy Group Ltd.
Inland Fuel Terminals, Inc.
S. George Santa, Pres.
Donald F. Santa, Sec.
John S. Santa, Treas.
Norman K. Santa, VP
Robert Benn, Sls. Mgr.

■SANTEE OIL CO., INC.
P.O. Box 567
Kingstree, SC 29556
(803) 354-6131
Key: M; G, F, D, L
W. H. Cox, Pres.
C. G. Bass, VP-Treas., Gen. Mgr.
Joan M. Cox, Sec.

■SAVCO INC.
7813 Percival Rd.
P.O. Box 84
Columbia, SC 29206
(803) 787-8245/799-5472
Key: M; G, LPGr, Lr
L. L. McNair, Pres. & CEO
Charles E. McNair, Exec. Mktg. VP

■SAVE-X, USA, INC.
130 Sycamore Ave.
Roanoke, VA 24012
(703) 342-7885
Key: M; Gr, Dr
Sub: Serv-n-Save, Inc.
Roy R. Pollard Jr., Pres. & CEO
W. Earle Spruill Jr., VP & Gen. Mgr.
Paul H. Powell, Dvlpmnt. & Opns. Mgr.

■SAVINGS OIL CO.
P.O. Box Drawer 1688
Tupelo, MS 38802-1688
(601) 842-7525

■SCASCO
(The Standard Cycle & Auto Supply Co.)
22 Rowley St.
Winsted, CT 06098
(203) 379-3322
Key: M; G, F, D, Lw
Milton Dolinsky, Pres. & CEO
David Dolinsky, Exec. VP & Sec.
George Mesloh, Sls. Mgr.
Richard MacPherson, Sr. VP
William Harding, Mgr., Fuel Oil Sls.
William Boucher, Mgr., Gasoline Sls.

■SCHAEFFER OIL, INC.
Box 490
Winner, SD 57580
(605) 842-3509
Key: M; G, D, L
Dwight L. Schaeffer, Pres.
Brian K. Schaeffer, VP

■SEABOARD INDUSTRIES, INC.
5810 New Peachtree Rd.
Doraville, GA 30340
(404) 451-6900
Key: O-Manufacturer; Lw
Subs: Seaboard Oil Industries of Florida, Inc.
Superior Products Company
Eastlake Oils, Inc.
Israel Katz, Pres. & CEO
Lee N. Katz, Exec. VP
Robert Ostendorf, Mktg. VP
Denise Goff, Gen. Sls. Mgr.
Conrad Felix, Mgr., Jacksonville
Steve Craig, Mgr., Greensboro
Jerry Ashteneau, Mgr., Lake Charles

■SEARS OIL CO., INC.
1914 Black River Blvd.
Rome, NY 13440
(315) 337-1232
Key: M; G, F, D, Lr
Aff: Sears Petroleum & Transport Corp.
H. P. Sears Jr., Pres. & CEO
T. A. Sears, VP, Sls. & Mktg. Opns.
James Plumb, Mgr., Retail Sls.
James Kittleman, Credit Mgr.
Geo. Brown, Off. Mgr.
David Miller, Acct.

■SELF-SERVICE OIL CO.
53 Airport Drive, P.O. Box 6206
Rockford, IL 61125-1206
(815) 964-3920
Key: M; Gr, Dr
W. R. Williams, Pres. & CEO
W. R. Williams III, VP
Charles F. Bergquist, VP
Charles Mosebach, Supv. MO
Kellie VonDriska, Supv. IL-IA
Connie Flemming, Dist.

■SEMINOLE ASPHALT REFINING
P.O. Box 128
St. Marks, FL 32355
(904) 224-1194
Key: R; F, D
H. Carl Vought, Pres.
B. M. Nichols, VP, Ref.

■SHAHEEN NATURAL RESOURCES CO.
90 Park Ave.
New York, NY 10016
(212) 867-0250
Key: I, T, R, M; Gw, LPGw, L
Sub. of MacMillan Ring-Free Oil Co.
Jesse Taub, Pres.
Milton Hibdon, VP
Peter Caras, VP

■SHAVER & McCARTHY INC.
259 E. Lake St.
Wayzata, MN 55391
(612) 473-7391
Key: M; G, L
Baird Shaver, Pres. & CEO
Craig Shaver, Sec.

■SHAY OIL CO., INC.
51 E. 10th St.
Yuma, AZ 85364
(602) 782-1828
Key: M; Gr, Dr,
Sub. of Exxon
Daniel C. Shay, Pres.
Neal Schulmann, Gen. Sls. Mgr.
John Bonnet, VP, Mktg.

■SHELL CANADA LTD.
P.O. Box 100
Calgary, Alberta T2P 2H5, Canada
(403) 232-3111
Key: I; G, D, F, LPG, L
Sub. of Royal Dutch/Shell Group
J. S. MacLeod, Pres. & CEO
D. J. Taylor, Exec. VP, Prod. Group
A. E. Seager, VP, Eastern Group
E. Wende, Mgr., Motors Strategy & Planning
R. D. Kowal, Mgr., Cons. Res.

■SHELL OIL COMPANY
One Shell Plaza
P.O. Box 2463
Houston, TX 77001
(713) 241-6161
Key: I; G, D, Fw, LPGw, L
J. F. Bookout, Pres.
C. L. Blackburn, Exec. VP, E&P
J. H. DeNike, VP, Public Affairs
F. H. Richardson, Exec. VP, Prod.
D. B. Richardson, Pres., Shell Ref. & Mktg. Co.
J. R. Street, Pres., Shell Chemical Co.
J. W. Schutzenhofer, Gen. Mgr. Mktg.
Q. P. Graves, Gen. Mgr., Eastern Reg.
R. Lopez, Gen. Mgr., Western Reg.
R. J. Bertus, Gen. Mgr. Sup. & Trans.
L. L. Osborn, Mgr. Employee Relations Support-Products
J. J. O'Connell, Mgr., Sls. & Bus. Svcs.
J. M. Morgan, Mgr., Lubricants Dept.
J. L. Golden, Mgr., Reg. Business Center—WOR
R. C. Harrell, Mgr., Reg. Business Center—EOR
S. C. Lancaster, Mgr., Prod. Distrib.
R. H. Garnett Jr., Mgr., Head Office Retail
J. F. Kelly, Venture Mgr.
W. L. Faulkenberry, Mgr., Retail Mktg. Western
J. B. Bird, Mgr., Retail Mktg. Eastern
M. E. Thorne, Mgr., Retail Mktg. Midcontinent
D. R. Healy, Mktg. Mgr. Jobber Sls., Eastern
W. S. Little Jr., Mgr. Comm. Mktg.
J. A. Rexrode, Nat'l. Sls. Mgr., Lubricants Dept.

LUBRICANTS DISTRICTS

Chicago District
1415 West 22nd St.
Oakbrook, IL 60521
(312) 887-5718
L. L. Burch, Mgr.

Cleveland District
7123 Pearl Road
Middleburg Heights, OH 44130
(216) 842-4000
E. V. D'Innocente, Mgr.

East Coast District
100 Executive Drive
West Orange, NJ 07052
(201) 325-5497
E. Dent Jr., Mgr.

Houston (TX 77046) District
Weslayan Tower
24 Greenway Plaza
Suite 711
(713) 439-1000
E. L. Schmitz, Mgr.

West Coast District
511 North Brookhurst
Anaheim, CA 92803
(714) 991-9200
J. M. Coghlan, Mgr.

RETAIL MARKETING DISTRICTS

Atlanta (GA 30339) District
320 Interstate North Parkway
(404) 955-4600
J. W. Ludwig, Mgr.

Boston/Providence District
400 Blue Hill Drive
Westwood, MA 02090
(617) 326-8210
F. F. Kidd III, Mgr.

Miami District
100 S. Pine Island Rd.
Suite 130
Plantation, FL 33324
(305) 944-3487
R. L. Cheatham, Mgr.

New Orleans (LA 70150) District
P.O. Box 50698
(504) 588-4911
T. V. Barrows, Mgr.

New York District
1 Jericho Plaza
Jericho, NY 11753
(516) 938-8686
B. P. Vander Mel, Mgr.

Newark District
100 Executive Drive
West Orange, NJ 07052
(201) 325-5300
R. F. Gardner, Mgr.

Tampa (FL 33622) District
P.O. Box 22086
(813) 877-5741
F. E. Weltz, Mgr.

Mid-Atlantic District
10400 Little Patuxent Parkway
Suite 440
Columbia, MD 21044
(301) 995-1200
W. D. Ramsey, Mgr.

Chicago District
1415 W. 22nd
Oakbrook, IL 60521
(312) 887-5500
W. F. Butzloff, Mgr. North
J. L. Shanks, Mgr. South

Cleveland District
7123 Pearl Road
Middleburg Heights, OH 44130
(216) 842-4000
D. P. Archambault, Mgr.

Dayton District
1129 Miamisburg
Centerville Road
Dayton, OH 45449
(513) 866-6201
R. F. Woodworth, Mgr.

Detroit District
31275 Northwestern Hwy.
Farmington Hills, MI 21044
(313) 885-9000
J. B. Uguccioni, Mgr.

Houston/Dallas District
P.O. Box 22073
2400 West Loop, Suite 114
Houston, TX 77027
(713) 621-0330
B. T. Baty, Mgr.

Indianapolis (IN 46268) District
8500 N. Michigan Road
(317) 291-7440
W. J. Beumer, Mgr.

St. Louis (MO 63074) District
500 Northwest Plaza
Suite 1000
St. Ann, MO 63074
(314) 291-5700
G. W. Hadley, Mgr.

East Bay District
3468 Mt. Diablo Boulevard, Suite B103
Lafayette, CA 94549
(415) 283-4200
T. J. O'Brien, Mgr.

Hawaii District
1441 Kapiolani Boulevard, Suite 1001
Honolulu, HI 96805
(808) 946-0761
R. L. Wilsorf, Mgr.

Los Angeles District
511 Brookhurst Street
Anaheim, CA 92803
(714) 991-9200
R. S. Kovacovich, Mgr., Central
H. W. Jenkins, Mgr., East
S. J. Charley, Mgr., West

Sacramento (CA 95813) District
P.O. Box 13678
(916) 481-0400
G. O. Chadwick, Mgr.

San Francisco District
1150 Bayhill Drive, Suite 200
San Bruno, CA 94066
(415) 952-2250
V. K. Clifford, Mgr.

Northwest District
400-108th Avenue, N.E.
Bellevue, WA 98004
(206) 453-3000
J. M. Biladeau, Mgr.

Southern California District
511 North Brookhurst Street
Anaheim, CA 92803
(714) 991-9200
R. M. Sherwood, Mgr.

KEY

I	Integrated
T	Transporter
R-M	Refiner-marketer
M	Marketer
G	Gasoline, wholesale/retail
F	Fuel Oil, wholesale/retail
D	Diesel, wholesale/retail
LPG	Liquefied petroleum gas wholesale/retail
L	Lubricants, wholesale/retail
w	wholesale only
r	retail only

■**SHEPHERD OIL**
P.O. Box 100
Morristown, AZ 85342
(602) 975-1111
Key: O-Alcohol dist.
P. Wyman Shepherd, Pres. & CEO
Richard Dodd, Exec. VP

■**SHIPLEY-HUMBLE, INC.**
550 East King Street
P.O. Box 946
York, PA 17405
(717) 848-4100
Key: T, M; G, F, D
W. S. Shipley II, Pres.
H. C. Zimmerman, Exec. VP
J. F. Freet Jr., VP-Finance, Sec.-Treas.
G. I. Ioos, Asst. Sec., Credit Mgr.
D. E. Wilson, Mgr., Supply & Distrib.
R. C. Borden Jr., Mgr., Motor Fuels Sls.
W. S. Shipley III, Retail Fuel Oil Sls. Mgr.
I. E. Baumgardner, Mgr., Svcs. Dept.

■**SHORES OIL CO.**
19933 Nine Mile Rd.
St. Clair Shores, MI 48080
(313) 776-2670
Key: M; G, F, D, L
Edward D. Brown, Pres.
Robert A. Dryden, Exec. VP
Edw. Vollenweider, VP
Vincent Manzo, Controller

■**SHOTMEYER BROS. PETROLEUM CORP.**
10 Wagaraw Rd.
Hawthorne, NJ 07507
(201) 427-1000
Key: M; G, F, D, L
Henry Shotmeyer Jr., CEO
Charles Shotmeyer, Pres.
Henry Shotmeyer, Treas.

■**SHOTMEYER OIL CORP.**
1 Valley Street
Hawthorne, NJ 07506
(201) 427-8200
(305) 392-8100
Key: M; Gr, Dr
Sub. of Albert Shotmeyer, T/A ASCO
Subs: Gas Pumpers of America Corp.
United States Oil Corp.
Gas Pumpers of America Corp.
Motorgas Oil & Ref. Corp.

United States Oil Corp.
1 Valley Street
Hawthorne, NJ 07506
(201) 427-8200
(305) 392-8100
Key: M; Gr, Dr
Elizabeth Jo Shotmeyer, CEO
William Wrocklage, Pres.
Kathleen Ippoliti, VP
Myron T. Holman, Sec.

Gas Pumpers of America Corp.
1 Valley Street
Hawthorne, NJ 07506
(201) 427-8200, 423-1000, (305) 392-8100
Key: M-U Save; Gr, Dr
Sub. of Shotmeyer Oil Corp.
Albert Shotmeyer, CEO
Myron T. Holman, Pres.
Norman R. Steenstra, Exec. VP
Elizabeth Jo Shotmeyer, VP

Motorgas Oil & Ref. Corp.
1 Valley St.
Hawthorne, NJ 07506
(201) 427-8200, 423-1000
Key: M; Gr, Dr
Sub. of Shotmeyer Oil Corp.
Albert Shotmeyer, CEO
Myron T. Holman, Pres.
Norman R. Steenstra, Exec. VP
Elizabeth Jo Shotmeyer, VP

ASCO TERMINALS:
Syracuse, NY Terminal
(315) 471-1022
Joseph Costello, Mgr.

Newburgh, NY Terminal
(914) 561-6200
Robert Speirs, Mgr.

Wilmington, DE Terminal
(302) 652-1000

■**SICO COMPANY**
15 Mount Joy Street
Mount Joy, PA 17552
(717) 652-1411
Key: M; G, F, D, L
Sub. of The SICO Foundation
Sub: Clarence Schock
Franklin R. Eichler, Pres. & Treas.
Michael T. Reese, VP, Mktg.
Charles W. Ricedorf, VP, Opns.
Robert K. Shank, Sec.-Asst. Treas.
Edward F. Zercher, Asst. Sec.-Retail Mktg. Mgr.
Eugene W. Crider, Whlsl. Mktg. Mgr.
Gary Maxwell, Cust. Svcs. Mgr.
Phillip A. Veith, Svc. Stat. Mktg. Mgr., PA
Bernie Branderbit, Svc. Stat. Mktg. Mgr., New Jersey

■**SIMMONS OIL CORP.**
8655 Via de Ventura
Scottsdale, AZ 85261
(602) 948-7250
Key: T-R-M; Gw, Fw
Subs: Simmons Crude Oil Co.
Simmons Terminal Corp.
Montana Refining Co. (50% ownership with Holly Corp.)
Jerry Simmons, Pres. & CEO
J. D. Wessling, CFO
Wendy McGee, Treas./Comptroller
Bob Roehl, VP, Crude Oil

■**SIMON OIL COMPANY, INC.**
1316 Main Street
Niagara Falls, NY 14301
(716) 285-9641
Key: M; G
Theodore Dimet, Pres.
Eugene Dimet, VP
Ken Kimmins, Gen. Sls. Mgr.
Peter Barber, C-Stores Supvr.

■**SINCLAIR MARKETING**
P.O. Box 31825
Salt Lake City, UT 84131
(801) 363-5100
Key: I; G, Fw, Dw, L
R. E. Holding, Pres.
R. G. Little, VP
Bob Beard, Mgr., Supply & Distrib.
M. L. Rensink, Mgr., Asphalt Sls.
Clint Techmeyer, Credit Mgr.

■**SING OIL CO.**
P.O. Box 1538
Thomasville, GA 31799
(912) 226-1211
Key: M; G, D
L. H. Singletary, Chmn. of Brd.
Richard Singletary, Pres.
T. E. Perry, Exec. VP
John L. Parker, VP Mktg.
W. D. Strictland, Retail Estate Mgr.

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TWX: 710-996-5973
TELEX: 13-9317
84-4791

INLAND WATERWAY DIVISION:
2100 L&A ROAD
METAIRIE, LA 70181
PHONE: 504-833-1463
TWX: 810-951-6061

GULF COAST DIVISION:
1404 SO. HOUSTON-PASADENA RD.
PASADENA, TEXAS 77502
PHONE: 713-477-8171
TWX: 910-881-1751

WEST COAST DIVISION:
115 AVALON BLVD.
WILMINGTON, CA 90744
PHONE: 213-549-7990
TWX: 910-345-6391

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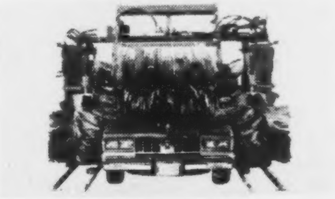

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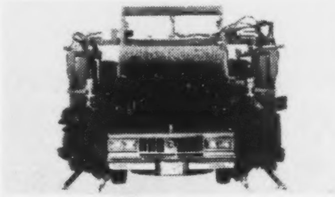

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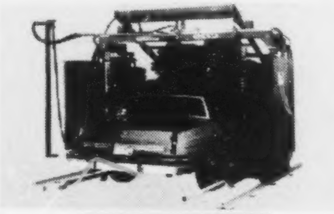

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612/929-2639

■SINKLER INC.
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Southampton, PA 18966
(215) 357-7100
Key: M; Gr, F, D
Albert W. Woosnam Jr., Pres.
Douglas E. Woosnam, VP
Richard E. Greim, Sec.
Gene Michelson, Fuel Oil Sls. Mgr.
Steve Yenchik, Equipment Sls. Mgr.

■SITE OIL CO.
7755 Carondelet
St. Louis, MO 63105
(314) 725-4321
Key: M; Gr, Fr
Alvin Siteman, Pres.
Chris Kemph, VP, Mktg.

■SMITH-SHAFER OIL CO.
P.O. Box 580
Rockford, IL 61105
(815) 965-6767
Key: M; G, F, D, Lr
Ernst S. Shafer, Pres. & CEO
C. Gordon Smith, Sec.

■SMO, INC.
P.O. Box E
LaPlata, MD 20646
(301) 934-8101
Key: M; G, F, D, LPGr, L
Sub: Delmarva Oil, Inc.
J. Blacklock Wills, Pres.
Charles F. Buyers, Sr. VP
J. Blacklock Wills Jr., VP, Mktg.
J. R. Binette, Motor Fuels Div. Mgr.
J. A. Gateau, Heating Fuels Div. Mgr.

■SOMERSET REFINERY
520 Monticello St.
Somerset, KY 42501
(606) 679-6301
Key: R, M; G, F, D, L
W. T. Walker, Pres.
T. S. Ballance, VP
Cy Waddle, VP
Merrel Henderson, VP, Sls. & Distrib.

■SOS OIL CORP.
P.O. Box 833
Tuxedo, NY 10967
(914) 351-4709
Key: M; G, F, D, L
George Spiegel, Pres.
Richard Spiegel, Sec./Treas.
Linda Wilkinson, Office Mgr.
Albert Silberlicht, Gen. Mgr.

■J. R. SOUSA AND SONS
29 Andover St.
Danvers, MA 01923
(617) 777-1500
TWX 710-347-0609
Key: M; G, F, D, L
Joseph J, Sousa, Pres.
Jerome R. Sousa Jr., Treas.
John Martino, Mgr., Sup. & Distrib.
Louis Arvenites, New Engl. Sls. Mgr.
James Whitaker, Albany Div. Mgr.
Gary Kuzcek, Poughkeepsie Div. Mgr.
Lawrence King, Compt.

■SOUTHERN COUNTIES OIL CO.
1011 Laguna Road
Tustin, CA 92680
(714) 544-7140
Key: M; G, D, L
Frank H. Greinke, Pres. & CEO
Richard Becktel, Exec. VP, Whlsl.
Frank P. Greinke, Exec. VP, Retail
Robert Kennedy, Mktg. VP

■SOUTHERN OIL CO., INC.
P.O. Box 1278
Suffolk, VA 23434
(804) 539-2374
Key: M; G, F, D, L
C. P. Holland Jr., Chmn.
David L. Holland, Pres.

■SOUTHERN STATES CO-OP
P.O. Box 26234
Richmond, VA 23260
(804) 281-1000
Key: R-M; G, F, D, LPG, L
Gene A. James, Pres. & CEO
M. T. Ragsdale, VP, Pet. & Supply Div.
Raymond Works, Mgr., Pet. Svcs.

■SPARTAN PETROLEUM CO., INC.
P.O. Drawer 1170
Spartanburg, S.C. 29304
(805) 585-3416
Key: M; Gw, F, Dw, Lw
R. E. Mitchell, Pres. & CEO
G. E. Mitchell, Exec. VP
W. T. Hope, Sls. Mgr.
M. L. Leverette, Sec.
R. H. Mitchell, Sls. Coord.

■SPEEDWAY PETROLEUM CO.
237 Lunenburg St.
Fitchburg, MA 01420
(617) 345-4688
Key: M; G, F
Donald R. Tucker, Pres. & CEO
Jeff Bridgeman, Mgr., Retail Sls.
June LeMieux, Credit Mgr.
Richard Grant, Opns. Mgr.

■SSG CORPORATION
1207 Coulee Rd.
Hudson, WI 54016
(715) 386-8281
Key: M; Gr
Burt Nordstrand, Pres.
Gail Nordstrand Dahlstrom, VP
Larry Hopkins, Treas.
Jim Coen, Gen. Sls. Mgr.

■THE STANDARD OIL COMPANY (OHIO)
Midland Building
Cleveland, OH 44115
(216) 575-4141
Key: I; G, F, D, LPGw, L
Affiliate of British Petroleum Limited
Subs: BP Oil Inc.
  Boron Oil Company
  Mountaineer Carbon Company
  Truckstops of America
A. W. Whitehouse, Chmn. & CEO
J. R. Miller, Pres. & Chief Opn. Offc.
F. E. Mosier, Exec. VP, Downstream Petro.
J. G. McDonald, Pres., Sohio Oil
R. M. Donaldson, VP, Govmt. and Public Rel.

Retail Marketing
H. D. Hanna, Sr. VP
J. D. Campbell Jr., VP, Branded Mktg.
D. L. Gaetjens, Gen. Mgr., Comcl. Sls.
H. T. Bubb, Gen. Mgr., Retail Sls.
J. R. T. Bassett, Gen. Mgr., Jobber Sls.
R. J. Pillari, Gen. Mgr., Truck Stops
D. P. Gleichauf, Mgr., TBA Sls.

Wholesale Marketing
D. A. Snively, VP
G. C. Greve, Mgr., Comcl./Whlsl. Sls.
D. B. Smith, Mgr., Lubricants Div.

■STAR OIL CO.
2929 Lapeer Rd.
Port Huron, MI 48060
(313) 985-9586
Key: M; G, F, D, L
F. C. Kaiser, Chmn.
C. A. Kellerman, Pres.
Ed Shreiner, VP, Sec.

■STAR SERVICE & PETROLEUM CO.
Box 1344
St. Louis, MO 63043
(314) 739-0026
Key: M; Gr
Cameron Henderson, Pres.
Clayton Litillier, VP
E. E. Hewson, VP

■STEUART PETROLEUM CO.
4646 40th Street, N.W.
Washington, DC 20016
(202) 537-8900
Key: T, M, O-Terminal Operator; G, F, D, L
Sub. of Steuart Investment Co.
L. P. Steuart II, Pres.
N. D. Potter, Sr. VP, Mktg.
Harry Youngling, VP, Fuel Oil Div.
Don Seybolt, Gen. Mgr., Retail Div.
Thomas Gaffney, VP, Supply-North
Ben Matthews, VP, Supply-South

■STORMY OIL CO.
P.O. Box 1841
St. Cloud, MN 56302
(612) 251-6272
Key: M; G, F, D, L
Sub. of St. Augusta Oil Co.
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Patrick Tracey
James Tracey
Leslie Vakelich, Sec.

■STRIKER INDUSTRIES INC.
285 Broadway-Gaslight Square
Saratoga Springs, NY 12866
(518) 587-1363
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Thomas J. Shea, Opns. Mgr.
William R. Fletcher, Sls. Mgr.
Earl C. Lucci, Acct. Mgr.
Judy Sullivan, Acct. Receiv. Mgr.

■SUBURBAN OIL CO.
1301 W. 22nd St.
Oak Brook, IL 60521
(312) 325-9526
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John H. Curran, Pres.
Clyde F. Todd Jr., Mktg. VP
James W. Johnston, Sec.
P. G. Marra, Mgr., Admin. Svcs.

■SUBURBAN PROPANE GAS CORP.
334 Madison Ave.
Morristown, NJ 07960
(201) 540-0300
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Sub. of National Dist. & Chemical Corp.
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Robert M. Plante, Asst. VP
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■SUMRALL OIL SERVICES, INC.
P.O. Box 525
Bay Springs, MS 39422
(601) 764-2135
Key: M; Gr
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James D. Milkins, Mktg. VP
Betty B. Sumrall, Sec./Treas.

■SUN REFINING AND MARKETING COMPANY
1801 Market Street, 10 Penn Center
Philadelphia, PA 19102
(215) 977-3000
Key: I; G, F, D, LPGw, L
Sub. of Sun Company, Inc., 100 Matsonford Road, Radnor, PA 19087
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  Kelly Company
  Herr Gas & Oil Company
  Mohawk Valley Oil, Inc.
  Stop-N-Go Foods, Inc.
  Montour Auto Service, Inc.
  Mid-State Oil Co.
  Thill Oil Sales
  Mascot Petroleum Co.
  King Kwik Minit Market, Inc.

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T. A. Burtis, CEO
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R. McClements Jr., Pres.
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E. C. Gerner, Asst. Sec.
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D. I. Hughes, Treas.
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■SUNNY SERVICE STATIONS, INC.
P.O. Box I-U
Eugene, OR 97440
(503) 746-9614
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Ellis E. Emory, VP
Thomas E. Golden, Sec./Treas.

■SUNOCO INC.
56 Wellesley Street West
Toronto, Ontario Canada M5S 2S4
(416) 924-4111
Key: I; G, Fw, D, LPG, L
Sub. of Suncor Inc.
S. A. Cowtan, Exec. VP, Sunoco
C. K. Boland, VP, Mktg.
W. W. Gibson, Mgr., Retail Sls.
R. A. Hutchison, Mgr., Adv. & Merchandising

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Panama City, FL 32401
(904) 769-1661
Key: M; Gr, Fr, Dr
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K. White, Exec. VP
R. Lake, VP, Ret. Opns.
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R. Stephens, Purch. Agent
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200 Elgin Street, Suite 2
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(613) 234-3566
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Kenneth J. McCrimmon, Pres.
William M. McInerney, VP
Brian D. Mulligan, VP, Finance

Brantford Division:
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(519) 759-2480

■SUPER OIL CO.
P.O. Box 3039 CRS
Johnson City, TN 37602
(615) 926-2126
Key: M; Gr, Lr
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R. Steven Leonard, Exec. VP
John Haynie, Supr.

■SWANN OIL
67th St. & Schuylkill River
Philadelphia, PA 19153
(215) 492-8000
Key: T, M; G, F
Subs: Asphalt & Petroleum Co.
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  Northeast Industrial Oil Corp.
  Swann Oil Inc. of Philadelphia
  Swann Oil Inc. of N.C.
  Swann Oil of VA
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Edward J. Gallagher, VP, Opns.
Michael J. Burke, VP, Mktg.
J. B. Maher, VP, Finance
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■TANNER OIL CO.
620 So. Front St.
Ironton, OH 45638
(614) 532-9145
Key: M-Rich; Gr
Subs: Rich Oil Corp.
  Tanco, Inc.
  Rich of Ohio
  Rich of West Virginia
  Rich Terminal Co.
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Yonkers, NY 10710
(914) 476-5970
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  Terrone Fuel
  Bello Fuel
  Empire Fuel
  Mt. Pleasant Fuel
  Viking Petroleum
  Halstead-Quinn Fuel
  Halstead-Quinn LPG
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  ATI Ltd. (International Shipping)
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  ATI Gasoline
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Arthur Tarricone, VP Sec./Treas.
Edwin Goldwasser, VP, Finance
Mick Bombase, VP, Supply
Ben Davis, Credit Mgr.
Claire Tarricone, VP, Opns. & Admin.
Perry Garber, Commel. Sls. Mgr.
Michael Mushok, Mgr., Gasoline Mktg.

■TAUBER OIL CO.
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Houston, TX 77210
(713) 869-8700
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Bill Kile, VP, Petrochem
W. L. Saller, VP, LPG
Gerald Murray, VP, Mktg.
David Tauber, Exec. VP
Richard Tauber, Exec. VP
H. L. Mayes, VP, Crude Oil
Joseph Sassin, Controller

■TAYLOR OIL CO.
P.O. Box 5195
Winston-Salem, NC 27103
(919) 725-9531
Key: M; Gr, Dr
Subs: ETNA Service Station
  Triad Terminal Co.
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James E. Thompson, Exec. VP
Phillip E. Rhyne, Treas.
John A. Taylor Jr., Mktg. Mgr.
Jerry W. Stanley, Opns. Mgr.

■TCR, INC.
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Eight Mile, AL 36613
(205) 457-6827
Key: M; G, Dr, Lr
Sub. of Texas City Refining Co., Inc.
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Calvin Puckett, Retail Mgr.

■TENNECO OIL COMPANY PROCESSING & MARKETING
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Houston, TX 77001
(713) 757-2131
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R. S. Cunningham, Pres.
H. H. Daniel, Sr. VP, Mktg.
N. H. McLaurin, VP, Retail Mktg.
S. C. Johnson, VP, Whlsl. Mktg.

■TESORO PETROLEUM CORP.
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San Antonio, TX 78286
(512) 828-8484
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Subs: Tesoro Gasoline Mktg. Co.
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  Tesoro Alaska Petroleum Co.
  Tesoro Refining, Mktg. and Sup. Co.
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Dennis F. Juren, Pres.
J. P. Schmalz, Exec. VP
Milton Young, Group VP
Jack Charles, Group VP
James F. Smith, Group VP
Donald N. Bonnachi, Sr. VP, Admin.
M. Richard Stewart, Sr. VP, Counsel
John J. Tagliarino, Sr. VP, Ref.
E. W. Cromey, VP, Whlsl., Mktg. Supply
James R. Hyslop, VP, Treas.
John M. Morgan, VP, Oil Field Supply
Eugene Nasch, VP, Ref. Mktg.
Edward R. Bardgett, VP, Alaska Opns.
William M. Sims, VP, Publ. Rels.
Perry Woofter, Sr. VP, Govt. Rels.

Tesoro Gasoline Marketing Co.
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(213) 278-2160
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Earl Redmon, VP & Sls. Mgr.
Lyle Bittner, Opns. Mgr.

Tesoro Alaska Petroleum Co.
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Edward R. Bardgett, VP

P.O. Box 3691
Kenai, AK
Mark S. Necessary

Tesoro Petroleum Distributing Co.
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Harahan, LA 70183
John H. Morgan, Exec. VP

Tesoro Refining, Marketing & Supply Co.
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San Antonio, TX 78286
John J. Tagliarino, Sr. VP

9100 Wilshire Blvd., Suite 325
Beverly Hills, CA 90212
E. W. Cromey, Sr. VP
Steve Janzen, VP

■TEXACO INC.
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White Plains, NY 10650
(914) 253-4000
Key: I; G, F, LPG, L
Sub: Texaco Canada Inc.
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J. W. Kinnear, Exec. VP & Vice Chmn.
A. C. DeCrane Jr., Pres.

Texaco U.S.A.
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Houston, TX 77002
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R. R. Dickinson, Sr. VP, Opns.
James M. Seaman[illegible] Sr. VP, Downstream Op[illegible]
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Oak Brook, IL 60521
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(416) 443-7800
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Fort Wayne, IN 46895
(219) 432-9407
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Sub: Smith Petroleum Inc.
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James Couture, Gen. Mgr., Thornhill Oil Co., Inc.
Lonnie Wilson, Gen. Mgr., Smith Petroleum Inc.

■THORNTON OIL CORP.
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Louisville, KY 40223
(502) 425-8022
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■THRIFTY OIL CO.
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Sub: Golden West Refining Co.
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R. T. Flesh, VP
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Barry W. Berkett, VP, & Gen. Counsel

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Neil Wallis, Term. Mgr.

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Lincolnton, NC 28092
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Subs: Eaton Oil Co.
  Hugh Paschal Oil Co.
  Times Oil Co. of Reidsville
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William G. Boyd, Exec. VP
Bill Massey, Mktg. VP & Gen. Sls. Mgr.

■T. J. TERMINALS CORP.
P.O. Box 2775
Topeka, KS 66601
(913) 233-0881
Key: M
Dale Miller, Exec. VP
Bill Oliver, Av. Sls.

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Sacramento, CA 95825
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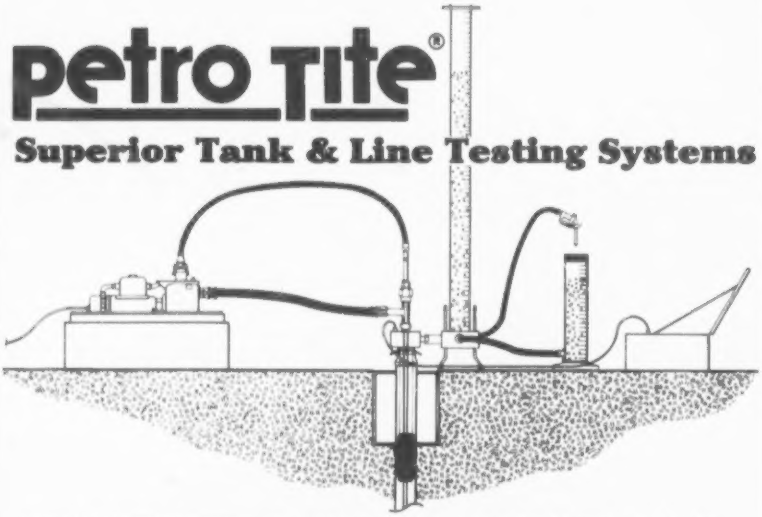

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■TOTAL PETROLEUM, INC.
999 18th Street
P.O. Box 500
Denver, CO 80201
(303) 291-2000
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Sub. of Total Petroleum (North America) Ltd.
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Jeffrey L. Kramer, VP, Whlsl. Mktg. & Prod. Supply
Wilfred B. Heiland, VP, Retail Mktg.
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Louisville, KY 40203
(502) 584-0101
Key: M; G, F, D, LPGr, Lr

■TRAVELERS PETROLEUM, INC.
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P.O. Box 1426
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Key: M; G, F, D, L
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■TRENTON OIL CO., INC.
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Trenton, NJ 08611
(609) 695-1220
Key: M; G, D, Lw
Cyril P. Forbes, Pres.
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4050 River Rd.
Cincinnati, OH 45204
(513) 347-1234
Key: M; Gw, Fw, Dw, Lw
Sub. of Ashland Oil, Inc.
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Tony Elsass, Reg. Sls. Mgr., Fleet Sls.
Lee Dunbar, Reg. Sls. Mgr., Refinery Sls.
Lynn Ernst, Asst. VP, Opns.

■TRITON INCORPORATED
4267 Winters Chapel Road
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Doraville, GA 30362
(404) 457-7271
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Don R. Gilliam, Exec. VP, Fin.
J. L. Conine, Sr. VP, Real Estate
Dennis P. Gagnon, Exec. VP, Sls. & Opns.

■TRYON OIL COMPANY
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Johnstown, NY 13095
(518) 382-0260
Key: M; G, F, D
Sub. of J. H. Buhrmaster Co., Inc.
James R. Buhrmaster, Pres.

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Calgary, Alberta T2N 2A1
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Robert McClinton, VP, Fin. & Admin.
Gerald Sioui, VP, Sup. & Distrib.
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Don Schafer, Retail Mktg. Mgr.
John Jenkins, Whlsl. Mktg. Mgr.
Gordon McCaig, Gen. Mgr., Freeway Trans.

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Southern Alberta Marketing Region
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Calgary, Alberta T1Y 6B5
(403) 291-3400
Dennis Schimanowsky, Region Mgr.

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Saskatoon, Saskatchewan S7K 6G5
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Richard Fernuk, Region Mgr.

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D. F. Walton, VP, Finance
W. L. Deloria, Gen. Sls. Mgr.
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C. R. Warnock, VP, Mktg., Western Reg.
T. W. Matthews, VP, Mktg., Eastern Reg.
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Karen Sikkema, Dir., Corp. Communications

Union 76 Division
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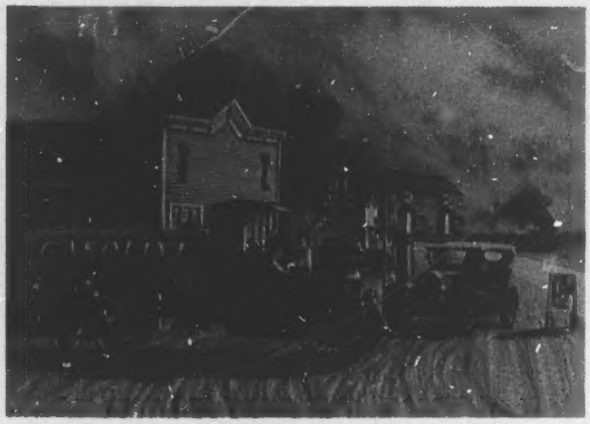

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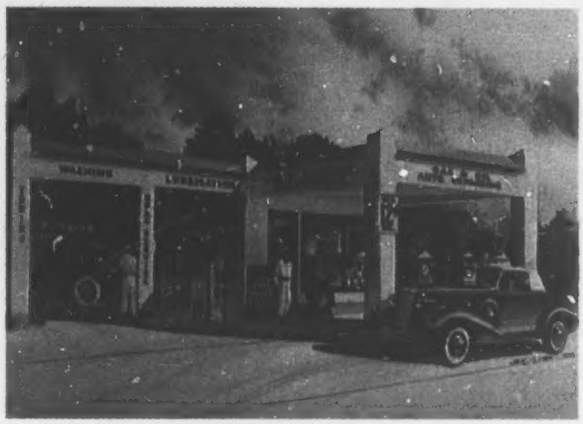

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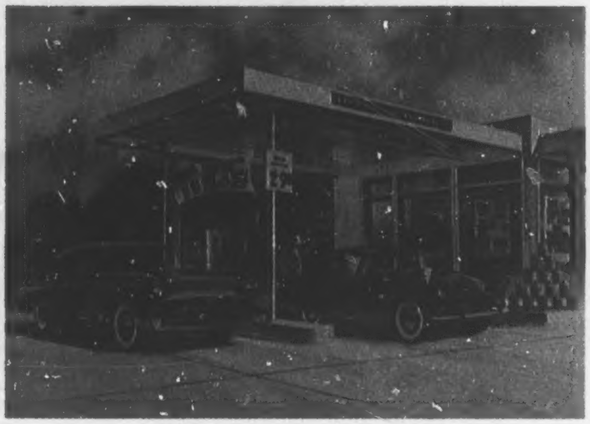

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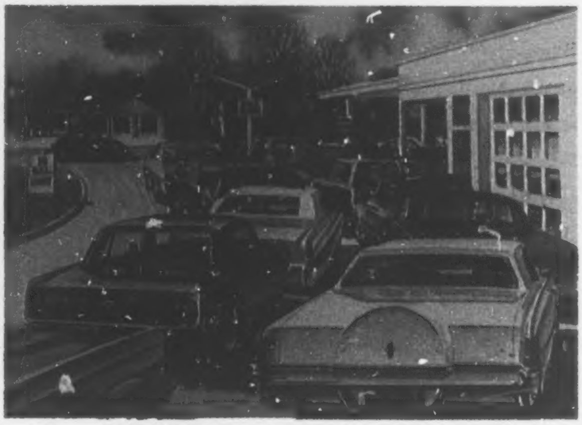

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HEADQUARTERS FOR DECALS, SAFETY SIGNS AND OTHER OUTSIDE SIGNS

Who, What and Where in the Capital

On this page you'll find a list of most of the agencies, Congressional committees and lawmakers in Washington responsible for energy policy important to marketers.

Department of Energy

Top-level administrators at DOE are at three different locations in Washington. Headquarters is at the James Forrestal Building, 1000 Independence Avenue, S.W. 20585, but many programs of interest to oil marketers are administered from other DOE locations at 2000 M Street N.W. 20461, and 1200 Pennsylvania Avenue N.W. 20461. Telephone numbers of key officials follow their listing below. The main DOE locator number is (202) 252-5000.

Secretary of Energy: John S. Herrington 252-6210
Deputy Secretary: Danny J. Boggs 252-5500
Special Assistant: Douglas Elmets 252-6210
Office of Policy, Planning & Analysis: William Vaughn (acting) 252-4700
Office of Environment Protection, Safety and Emergency Preparedness: Dissolved
Economic Regulatory Administration: Ray Hanzlik, Administrator 633-9734
Deputy Administrator: Marshall Staunton 252-1530
Special Counsel: Economic Regulatory Administration: Milton C. Lorenz 252-8900
Office of Settlements Division: Allen Finkel, Director 252-5665
Office of Fuel Programs: James Workman, Director 252-9356

Environmental Protection Agency

401 M Street S.W. 20460, (202) 382-4355

Administrator: Lee T. Thomas
Deputy Administrator: Alvin Alm 382-4700
Assistant Administrator, Enforcement and Compliance Monitoring: Courtney Price 382-4134
Assistant Administrator, Administration and Resource Management: Howard Messner 382-4600
Assistant Administrator, Water: Jack Ravan 382-5700
Assistant Administrator, Solid Waste & Emergency Response: Lee Thomas 382-4610
Inspector General: John Martin 382-4945

Occupational Safety and Health Administration

Department of Labor Building, 200 Constitution Avenue N.W. 20210, (202) 523-9361

Assistant Secretary for Occupational Safety & Health: Robert A. Roland
Deputy Assistant Secretary for Occupational Safety & Health: Patrick Tyson
Directorate of Policy, Legislation & Inter-Agency Programs: Anthony Goldin 523-8021
Directorate of Safety Standards Programs: Barry White 523-8061

Federal Trade Commission

Pennsylvania Avenue at Sixth Street N.W. 20580, (202) 523-3830. Economics Bureau is at 2120 L St. N.W. 20580, (202) 634-6881.

Chairman: James C. Miller
Commissioner: Mary Avcuenaga 523-3530
Commissioner: Patricia Bailey 523-3525
Commissioner: Terry Calvani 523-3732
Commissioner: George W. Douglas 523-4503
Director, Bureau of Competition: Timothy J. Muris 523-3601
Director, Bureau of Consumer Protection: Carol T. Crawford 523-3727
Director, Bureau of Economics: Wendy Lee Graham 634-6881
Associate Director, Advertising Practices: Wallace C. Snyder 724-1511
Associate Director, Marketing Practices: William T. Golden (acting) 523-1642

Congress

Oil-industry representatives testify before many Congressional committees each year, but the bulk of legislation affecting oil marketers is handled by two committees. On the Senate side the most important is the Energy and Natural Resources Committee, chaired by Sen. James McClure (R-Idaho).

In the House, most energy action important to oil marketers will continue to take place in the Energy Conservation and Power subcommittee of the Energy and Commerce Committee.

Senate Energy and Natural Resources Committee

SD-360 Dirksen Senate Office Building, 20510, (202) 224-4971
Michael D. Hathaway, staff director.

James A. McClure (R-Idaho), Chairman
Mark O. Hatfield (R-Ore.)
Lowell P. Weicker Jr. (R-Conn.)
Pete V. Domenici (R-N.M.)
Malcolm Wallop (R-Wyo.)
John W. Warner (R-Va.)
Frank H. Murkowski (R-Ark.)
Don Nickles (R-Okla.)
Chic Hecht (R-Nev.)
Daniel Evans (D-Wash.)
J. Bennett Johnston (D-La.)
Dale Bumpers (D-Ark.)
Wendell H. Ford (D-Ky.)
Howard M. Metzenbaum (D-Ohio)
John Melcher (D-Mont.)
Bill Bradley (D-N.J.)
Jeff Bingerman (D-N.M.)
John Rockefeller (D-W.Va.)

House Energy and Commerce Committee Subcommittee on Energy Conservation and Power

H2-316 House Office Building, Annex II, 20515, (202) 226-2424
Lawrence R. Sidman, staff director.

Edward Markey, (D-Mass.), Chairman
Al Swift (D-Wash.)
Ron Wyden (D-Ore.)
Ralph M. Hall (D-Texas)
John Bryant (D-Texas)
John Dingell (D-Mich.)
Mickey Leland (D-Texas)
Richard C. Shelby (D-Ala.)
Dennis Eckart (D-Ohio)
Gerry Sikorski (D-Minn.)
Carlos Moorhead (R-Calif.)
James Broyhill (R-N.C.)
Michael Oxley (R-Ohio)
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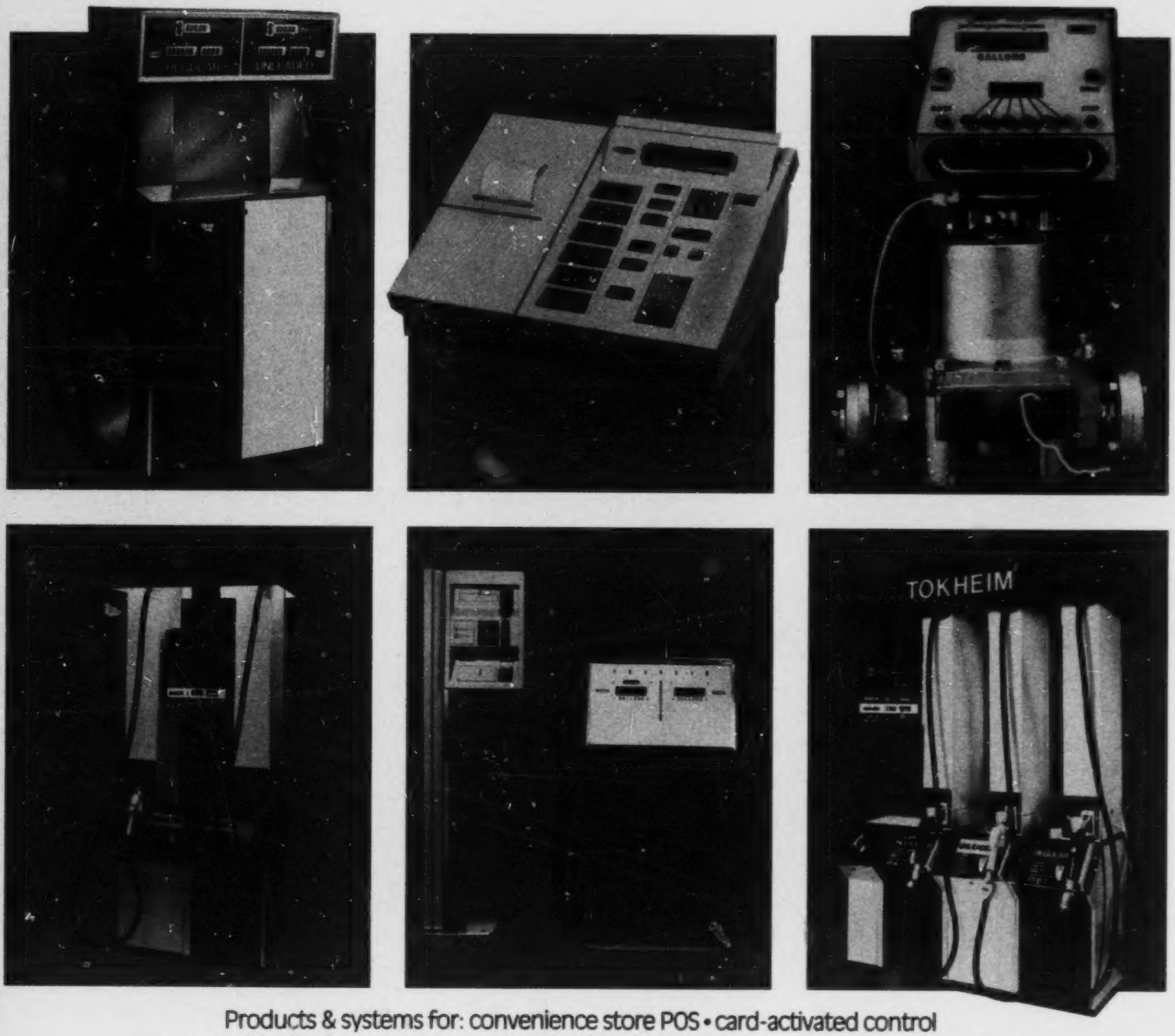

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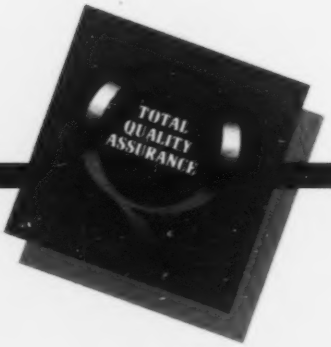

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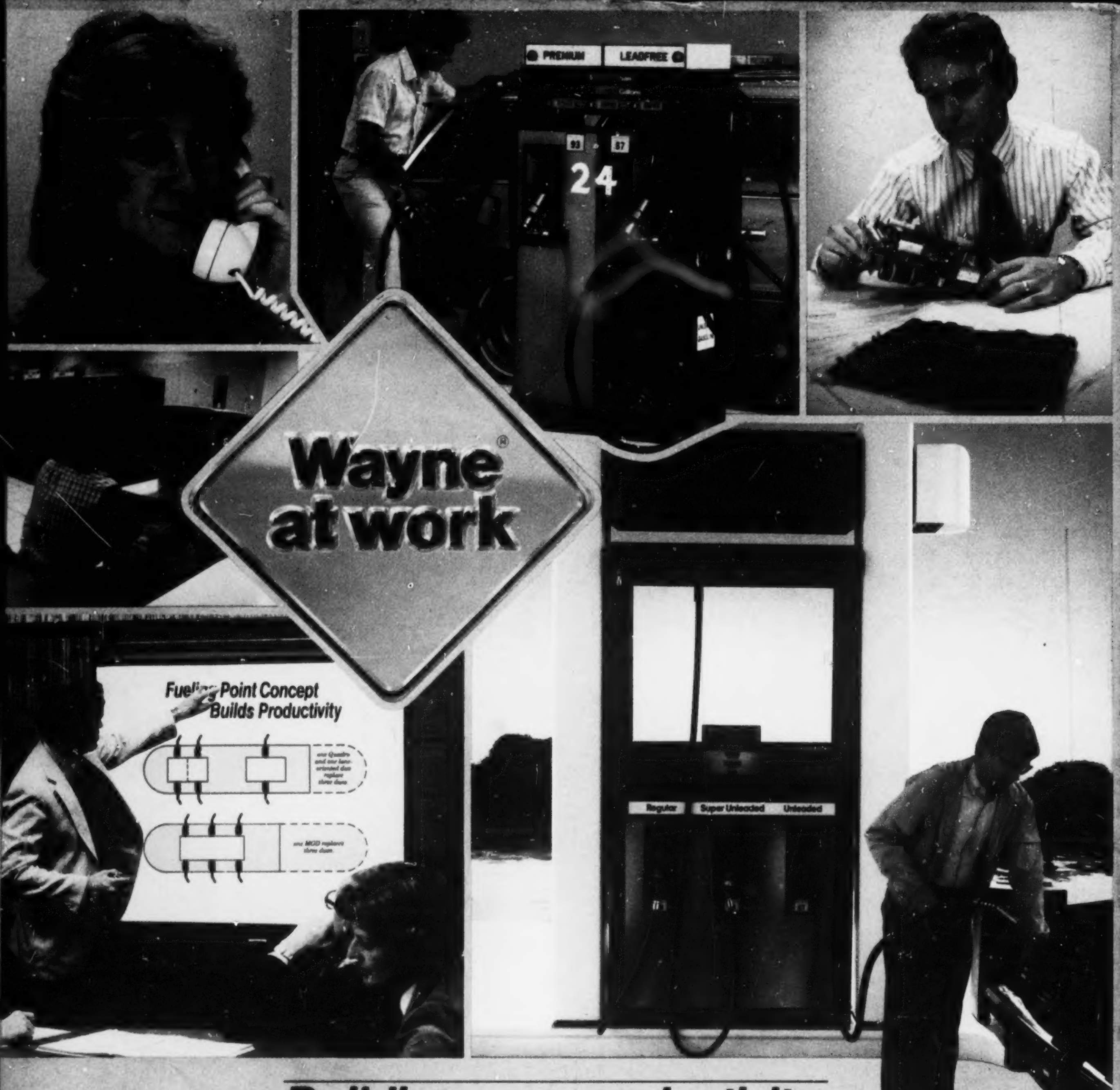

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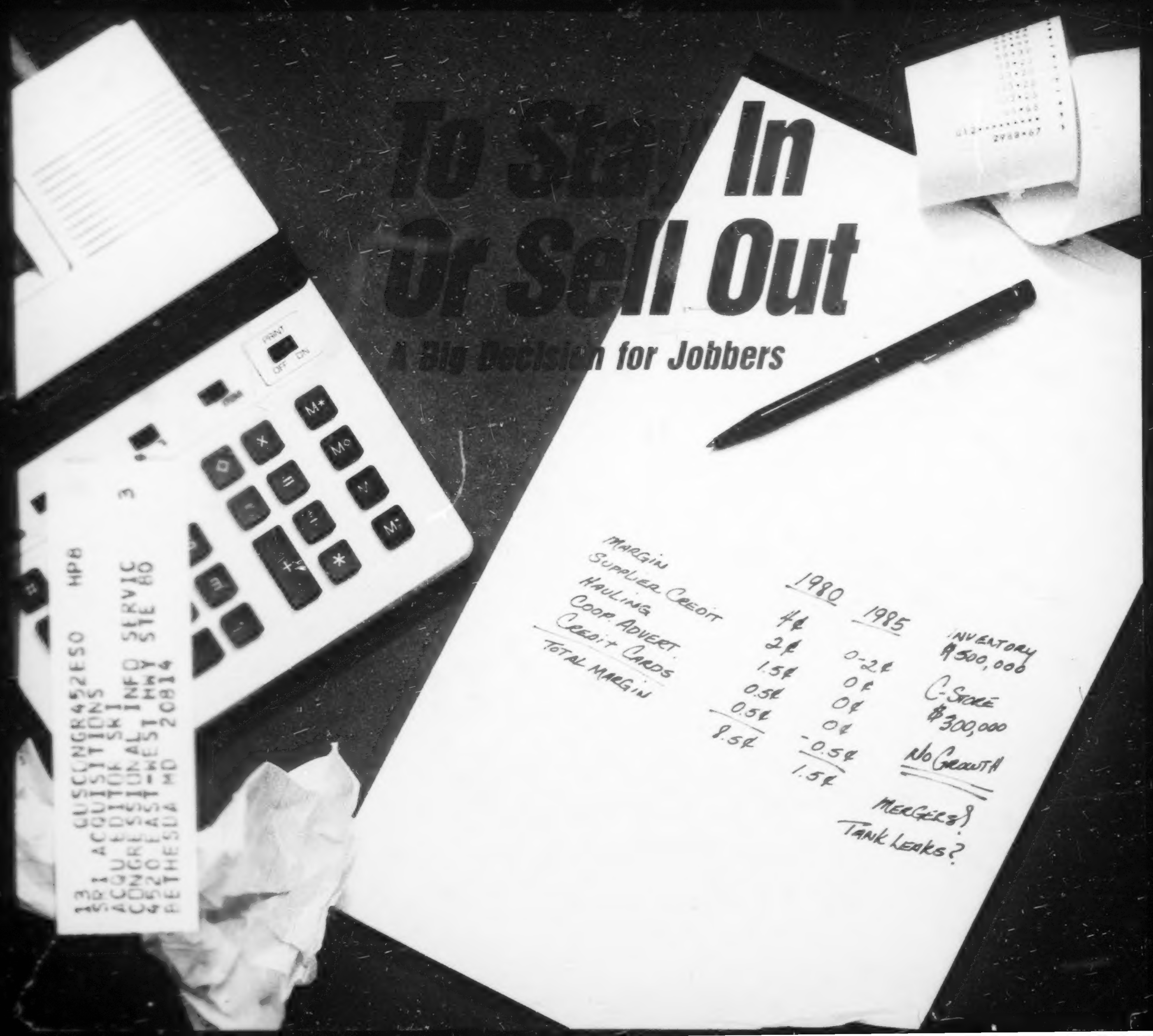
How 'Feeders' Are Sparking Battery Sales

Oil Heat Salutes Past, Looks to Future

Jobber's Computer Helps Fuel Oil Profits

NPN

National Petroleum News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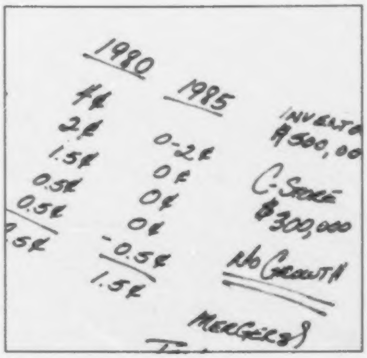


Once considered one of the easiest, safest and most-lucrative of small businesses, jobberships are going out of business at a record rate. The jobber fallout, to a large degree, is being caused by the loss of benefits once given him for his 'middleman' role. **Page 44**

Cover by John Apolinsky, Chicago

MACK
HOPSON

Despite the fact that fuel oil's share of the southeastern Wisconsin home heating market has shrunk to 16%, Hopson Oil is proving that sub-jobber operations and computers can help a company maintain a healthy position. **Page 54**

With a festive banquet that glorified the past and looked to the future with optimism despite the inevitability of additional marketplace losses, the heating oil industry ushered in its second century in upbeat fashion. **Page 58**

• TRENDS

Subtle Changes Reshape East Gasoline Marketing: The British are Coming!

Atlantic Richfield's surprisingly quick sale of its East Coast assets to Shell Oil, which has been around for a long time, and Atlantic Petroleum, a newcomer to the domestic scene [*NPN*—July '80, p37], contains some implications for gasoline marketers that are barely noticeable at first glance but nevertheless are intriguing indeed.

Chief of these is the impending internationalization of retail gasoline marketplaces on the Atlantic seaboard. Not just the supplying thereof with imported gasoline but down-in-the-street, toe-to-toe competition for customers and gallonage.

"Foreign" gasoline is not new to East Coast marketplaces. But direct retail competition is, no matter how it is disguised.

Ostensibly the biggest and most dramatic change of all in the Arco sale is its departure from the East Coast, where its jarring 4¢ to 6¢ gal. "edge" on gasoline prices kept most of its competitors in a mild uproar the last two or three years.

But there's more to it than that when the sale is coupled with other recent but unrelated events and viewed from a broader-based perspective.

Consider, for example, that four out of the last five major acquisitions of in-place marketing assets on the East Coast involved U.S. companies that are wholly or mostly owned by "foreign" oil interests. The only purely domestic transaction was Power Test's purchase of the old Getty operations in the Mid-Atlantic and Northeast.

These "foreign" oil interests are Shell, Atlantic Petroleum, Standard of Ohio and American Ultramar Ltd.

To unravel the situation, consider these facts:

Arco is selling 430 of its East Coast stations to Shell, which, until several months ago, was owned 70% by the Royal Dutch/Shell Group, and 30% by American shareholders. But Royal Dutch/Shell recently acquired the American interests, so Shell U.S.A. is a 100% British subsidiary, with managerial blessing flowing from London, not Houston.

Arco is selling 546 stations, 27 terminals and its 125,000 b/d refinery in Philadelphia to Atlantic Petroleum Corp. This is a newly chartered Delaware firm set up expressly by John Deuss, a Dutch oil trader headquartered in Bermuda, a British possession, to handle the U.S. operations. Deuss is regarded by fellow oil traders as a man who maintains tight control of all of his operations, including his Trans World Oil, which is another of his American companies. The strength of his reputation is such, however, that there'll never be any doubt about who's running the store—from Bermuda, not Philadelphia.

In the Southeast, Standard of Ohio is busily digesting the 5,600 service stations, 29 terminals and the 200,000 b/d Louisiana refinery it bought from Chevron in the Gulf spinoff. But Sohio long ago sold 53% of itself to British Petroleum Ltd. of London, so it qualifies as a majority-owned American subsidiary. And, since Sohio, via its own BP subsidiary, is in the process of making itself a powerhouse in East Coast gasoline marketing, it can be assumed that its British benefactors will have increasingly enhanced interest in the domestic operations as time goes on.

In the Northeast, another British offshoot, American Ultramar Ltd., has made no bones about the fact that it wants to expand its toehold in the New England gasoline and fuel oil markets as reasonably and as rapidly as it can. Ultramar jumped in with its purchase of the old Pittston/Metropolitan Petroleum and the Augsbury Corp. It's small now, but it is very ambitious.

The thrust of this perspective, however, is not to suggest that perhaps the time has come to re-enact Paul Revere's moonlight horseback ride, but to emphasize that four big internationals are now in direct retailing via subsidiaries and are positioning themselves to expand their marketing holds.

To be considered part of this picture, too, is the probable penetration of the Atlantic marketplaces by the Arab companies which long have entertained such notions. The Kuwaitis, for example, are known to have been interested in Arco's refinery, in the Texaco refinery at Eagle Point that Coastal got, and in the Gulf properties in the Southeast before Sohio came up with the best deal.

Make no mistake about it. They're coming in and probably soon. *—J. Richard Shaner*

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

MAY	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.223	$1.144	$1.231	$1.360
Regions:				
Northeast	1.211	1.123	1.202	1.335
North Central	1.226	1.160	1.246	1.374
South	1.208	1.124	1.211	1.355
West	1.252	1.165	1.266	1.404

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	6/28/85	6/29/84
Gasoline (total)	216,813	249,881
Gasoline (unleaded)*	101,560	109,336
Jet Kerosine	36,238	34,163
Distillates	108,441	112,744
Residual	41,040	49,585

**Included in gasoline total.*
Source: American Petroleum Institute.

35.6 percentage points over the 1983 levels.

"While these are certainly significant increases, one should not leap to major policy conclusions until several other factors are considered. First, the bulk of these imports are coming not from the politically unsettled Middle East but from nations which are considered strong allies by the U.S., including Brazil, Canada, Italy, the Netherlands, the Netherlands Antilles, Trinidad and Venezuela. In many instances, these imports are coming from American-owned refineries in other countries."

Griffith said that among the 10 top importers are eight companies with strong domestic refining interests including Amerada Hess, Northville Industries, Apex, Phillips, Texaco, Pacific Resources, Sun and Koch. Ironically, he noted, "some of those companies are the same ones which are urging consideration of some type of import restrictions."

On still another sensitive point, Griffith said hard data proves that current import penetration of the U.S. gasoline market is less than 6%.

He maintained that the import situation poses no threat to national security. As for the future, he noted that OPEC nations are scheduled to have a refinery capacity of 5.95-million b/d by 1986, of which almost half, 2.35-million b/d, would be available for export. A study shows this is expected to rise to 7.7-million b/d by 1988, of which 3.5-million b/d would be available for export.

But, he said, even if all of the gasoline would be aimed at the U.S. markets and current consumption remains static, it would represent only 9% of the total. Said Griffith: "Many experts considered it highly unlikely that the U.S. will receive [even] the bulk of these exports and, in fact, predict that they will go to Europe or the Far East, further eroding the refining centers in that part of the world."

Despite all of his strong testimony, Griffith ended with a hedge: "Let's keep an eye on imports, however, and if a rising tide makes the nation vulnerable to an embargo or a supply cutoff, or if competitive balances are upset in the marketplaces, then appropriate action may be necessary." **NPN**

Boxscore: 24 Refineries Gone, Capacity off 600,420 b/d

Energy Information Administration says that since the shakeout began in 1981, no less than 101 refineries have been mothballed, deactivated or dismantled altogether. Smaller refineries were especially hard-hit.

At the beginning of 1985, the U.S. industry still had 223 refineries in operation with a crude distillation capacity of 15.7-million b/d. This is not quite 3-million b/d less than it was in 1981 when it all began.

EIA says 26 refineries went down in 1984, but with two startups—a new unit and a reactivation—the net loss for the year was 24. Crude throughput decreased 600,420 b/d.

Here's a list of the 1984 shutdowns and startups [for prior years, see *NPN Factbook*, June 1985]:

District/Refinery/Location	Crude Distillation Capacity b/d	Years in Operation
PAD District 1		
Ashland Oil Inc., Buffalo, N.Y.	**64,000**	36+
PAD District 2		
Ashland Oil, Inc., Findlay, Ohio	20,400	36+
Ashland Oil, Inc., Louisville, Ky.	25,200	36+
Oklahoma Refining Co., Cyril, Okla.	12,750	36+
Oklahoma Refining Co., Thomas, Okla.	11,600	4
Tonkawa Refining Co., Arnett, Okla.	12,000	16
Tosco Corp., Duncan, Okla.	47,000	35
Total	**128,950**	—
PAD District 3		
Caribou-Four Corners, Inc., Farmington, NM	2,200	19
Celeron Oil & Gas Co., Mermentau, La.	11,000	6
Dorchester Refining Co., Mt. Pleasant, Texas	26,500	36+
Eddy Refining Co., Houston, Texas	3,250	36+
Hill Petroleum Co., Krotz Springs, La.	57,400	6
Mid-Gulf Energy Corp., Ingleside, Texas	39,400	6
Port Petroleum, Inc., Stonewall, La.	3,200	4
Quintana Petrochemical Co., Corpus Christi, Texas	33,300	30
South Hampton Refining Co., Silsbee, Texas	18,100	24
Southern Union Refining Co., Lovington, NM	36,100	8
Tesoro Petroleum Corp., Carrizo Springs, Texas	26,100	27
Warrior Asphalt Co., Holt, Ala.	5,500	30
Total	**262,050**	—
PAD District 4		
Caribou-Four Corners Inc., Woods Cross, Utah	**8,400**	21
PAD District 5		
Anchor Refining Co., Inc., McKittrick, Calif.	9,000	6
ECO Petroleum Inc., Long Beach, Calif.	0	8
Marlex Oil & Refining Co., Los Angeles, Calif.	21,100	7
Powerine Oil Co., Santa Fe Springs, Calif.	44,120	34
Tosco Corp., Bakersfield, Calif.	38,800	33
U.S.A. Petrochemical Corp., Ventura, Calif.	24,000	7
Total	**137,020**	—
US Total	**600,420**	—
New or Reactivated		
PAD District 1		
Virginia Oil & Refining Co., Jonesville, Va.	1,000	—
Amerada Hess Corp., Pork Reading, N.J.	68,000	—

Refineries by Capacity, 1981-1985

	No. of Refineries				
Crude Distillation Capacity (b/d)	**1985**	**1984**	**1983**	**1982**	**1981**
Less than 10,000	56	63	67	82	91
10,001-30,000	43	55	59	80	93
30,001-50,000	38	41	40	44	42
50,001-100,000	39	41	44	43	44
100,001-175,000	25	26	26	30	27
Over 175,000	22	21	22	22	27
Total	**223**	**247**	**258**	**301**	**324**

Source: Both charts—Energy Information Administration

No Foreign Buys From SPR, Add Indie Refiner Access?

The U.S. General Accounting Office says the Reagan Administration's plan to "draw down" oil from the Strategic Petroleum Reserve in the event of an emergency will probably succeed in holding crude prices down.

But GAO claims Congress should consider banning the sale of SPR oil to brokers and foreign governments, while at the same time providing independent refiners access to some of the oil.

The Department of Energy's SPR removal plan calls for sale of the oil to the highest bidder. A number of lawmakers, including Rep. Philip Sharp (D-Ind.), have criticized the proposal, claiming foreign entities could bid the price of the oil to such high levels as to undermine the purpose of the SPR.

The National Petroleum Refiners Association has argued that foreign entities should be restricted from participating in purchases from the SPR. But DOE claims other countries could get around the proposed restriction simply by setting up a front corporation in the U.S.

GAO said indie refiners should be guaranteed access to SPR oil since they are "more vulnerable to oil supply disruptions" than major refiners.

IPAA: Demand up Again—Will Increase 1% in 1985

Total product demand is expected to rise about 1% to nearly 15.8-million b/d in 1985, the Independent Petroleum Assn. of America's supply-demand committee says. A cheerful note: Although this represents a gain of only 45,000 b/d, it is the second year in a row that consumption has grown.

Motor gasoline, comprising almost half of the total volume, is projected to show a 1.2% increase in 1985. This means it is expected to average 6.78-million b/d in 1985 with the peak period coming in the third quarter when it will average 6.95-million b/d.

Middle distillate demand is forecast to increase 2% in 1985 with most of the strength in the transportation and construction sectors. In other words, diesel engines for highways and equipment.

Residual fuel oil's ski ride will continue, perhaps more precipitiously than in the past as nuclear energy and coal replace it for power generation.

(Thousands b/d except closing stocks)

	1st Qtr.	2nd Qtr.	3rd Qtr.	4th Qtr.	Year
Demand					
Motor gasoline	6,494	6,919	6,949	6,755	6,780
Aviation Fuels	1,175	1,227	1,268	1,248	1,230
Distillates	3,449	2,863	2,724	3,092	3,030
Residual	1,361	1,176	1,178	1,228	1,235
LPG	1,809	1,388	1,452	1,674	1,580
Other prods.	1,519	2,024	2,195	1,851	1,899
Total	**15,807**	**15,597**	**15,766**	**15,848**	**15,754**
Imports					
Crude oil	2,435	3,387	3,619	3,429	3,221
Motor gasoline	416	400	358	340	378
Distillates	201	246	259	310	254
Residual	566	563	563	584	569
Others	600	679	677	695	663
Total	**4,218**	**5,275**	**5,476**	**5,358**	**5,085**
Domestic Production					
Crude oil	8,928	8,891	8,877	8,865	8,890
Nat'l gas liquids	1,629	1,622	1,634	1,644	1,632
Total	**10,557**	**10,513**	**10,511**	**10,509**	**10,522**
Other supply*	622	731	791	770	730
Total Supply	**15,397**	**16,519**	**16,778**	**16,637**	**16,337**
Closing Stocks/Principal products (millions of bbl.)					
Motor gasoline	220.3	218.1	216.4	223.8	223.8
Distillates	107.7	111.8	142.2	154.0	154.0
Residual	46.3	45.6	46.6	47.6	47.6
Crude runs to stills	11,418	12,042	12,493	12,208	12,044

*Processing gain, unaccounted for crude and other hydrocarbons.

IPAA May 31, 1985 Supply-Demand Committee Report.

Pennzoil Files Lawsuit Over 'Handshake Deal' For $5-Billion Getty Buy

Which takes precedence in the eyes of the law: A handshake agreement in an industry where tradition says a man's word is his bond; or a formal written contract with another party which displaces and replaces the original verbal accord?

A state court jury in Texas is tusseling with that old-fashioned gut issue now and, no matter which side wins, it seems certain that appeals and counter-appeals will have the issue bouncing around in the court for years to come.

It's a belated fallout of l'affaire Pennzoil-Getty-Texaco.

To put things into perspective, here's a bit of history:

In the fall and early winter of 1983, Gordon Getty, son of the founder of the Getty empire (J. Paul Getty) and the management of Getty Oil Co. were publicly and privately squabbling over the company's operations and directions.

Getty was sole trustee of the Sarah C. Getty Trust, which owned 40.2% of the oil company's common stock.

Over the New Year holiday period, he and J. Hugh Liedtke, chairman of Houston-based Pennzoil Corp., negotiated a handshake agreement for the latter to acquire control of the oil company for $5.3-billion in a classic leveraged buyout.

The Getty board acted on the matter, but there are differences of opinion as to whether the board approved the agreement pending definitive terms and a written contract or just the price. But Getty did announce via news releases that a Pennzoil-Getty agreement in principle had been made.

Most of the details are still closely guarded secrets, but over that weekend Texaco got into the act and hardly had Pennzoil and Liedtke had time to celebrate their own coup when it was announced that Texaco had bought Getty for a little under $10-billion. Getty and Texaco formalized the proceedings with board approvals and written contracts, all of which subsequently were accepted by Federal Trade Commission and others. The merger of Getty into Texaco is now history.

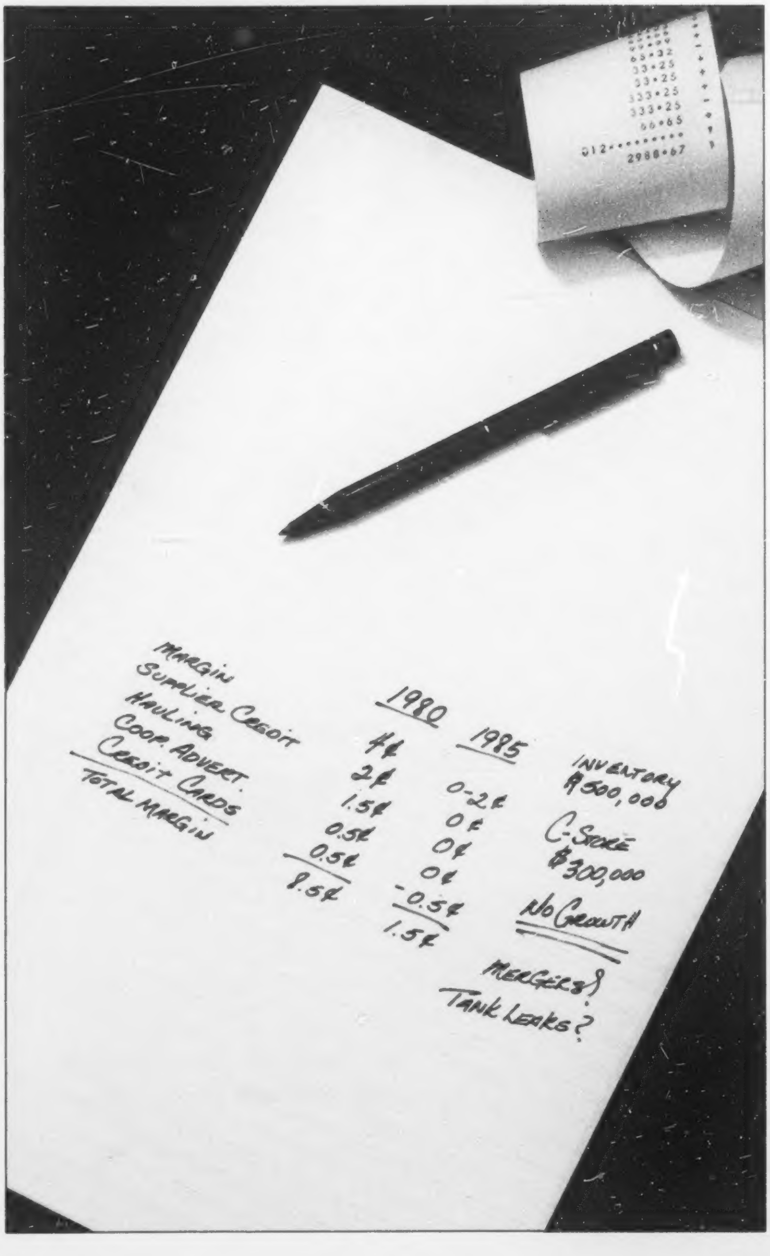
Liedtke and Pennzoil filed a $14-billion lawsuit against Texaco, alleging that Texaco induced Getty to change its mind and renege on the oral agreement. Liedtke has admitted that he has nothing in writing but is basing his suit on the concept that in the oil patch—and throughout most of the industry—"a man's word is his bond," and that he therefore had a valid, if unwritten, "contract" with Getty.

The jury trial was scheduled to start in Houston in mid-July.

COVER REPORT

To Stay In Or Sell Out

A Big Decision for Jobbers



Two oil jobbers recently were sitting around discussing the good fortune of a third jobber who had just unloaded a huge self-serve pumper to a major oil company for a reported $1.25-million.

"I know what I'd do with that much money," said one. "First, I'd take it home and just count it for two or three days. Then I'd take it to a bank offering the highest money-market interest rate and deposit it. I sure as hell wouldn't invest it in another 'gas' station."

Such seems to be the mood of a lot of oil jobbers nowadays. Although many of the larger ones with diversified operations are prospering and getting larger and larger, others are having their problems.

Once considered one of the easiest, safest and most-lucrative small businesses to get into, jobberships have been going out of business at a record rate for the past four-and-a-half years, and reports indicate that more may be for sale today than at anytime in the industry's history.

The jobber fallout, to a large degree, is being caused by dramatic changes in benefits once given him for his "middleman" role between suppliers and dealers. Suppliers began to reduce or eliminate many of these benefits when federal supply and price controls were ended.

There were approximately 15,160 jobber companies at the end of 1982, two years after the lifting of federal price and supply controls, according to the Petroleum Marketers Assn. of America (PMAA). There are now approximately 12,000, according to PMAA estimates. It bases this estimate on the fact it currently has 10,568 jobber members (3,942 motor fuel only, 1,078 heating oil only, and 5,548 combination motor fuel/heating oil) and believes it has from 85%-90% of the total jobber population.

Most of the approximately 3,160 jobbers who have disappeared since the end of 1982 are believed to have merged with others or sold out.

By Marvin Reid
Editor-in-Chief

Despite the shocking fallout already, many marketers and refiner-supplier executives believe there is more to come.

In a recent PMAA survey of refiner-suppliers, marketers, association executives and industry observers, 98% of the respondents predicted the fallout will continue for some years to come [See box].

"I think we could lose another one-fourth to one-third within a year to 18 months," says Jerdy Gary, president of the Texas Oil Marketers Assn. (TOMA). "A lot of jobbers are losing money and are getting more serious about selling out before they have to liquidate."

Big Squeeze

Much of the oil jobber attrition to date is traceable to the same conditions which are causing the entire oil industry to shrink rapidly on all fronts—the worst prolonged demand and price slump since the 1930s.

As a result of this slump, the large oil companies are curtailing exploration, closing refineries, laying off employees, boarding up service stations and selling off assets. Some, like Atlantic Richfield, are becoming regional rather than national marketers [*NPN*—July '85, p36].

All of this is happening, says Atlantic Richfield chairman Robert O. Anderson, because the industry in the late 1970s "got ready for a party that never occurred."

Anderson says that at about the time free world demand for oil was peaking in 1978, most oil company executives and the Carter Administration believed there was unlimited demand for energy ahead. "We thought then," Anderson says, "that world demand would be some 15-million b/d higher than it actually is." Sporadic supply shortages were foreseen, meaning a steady rise in prices.

"We underestimated volume (or demand) by 15-million b/d. We underestimated the price by something more than half," says Anderson.

Instead of continuing to grow at a fast clip as it had through most of the 1970s, oil demand suddenly began a steep nosedive in 1979. Today, U.S. oil demand remains at about 17% below the peak reached in 1978.

There was a slight recovery last year, but recent reports indicate that demand may be slipping again.

Petroleum Intelligence Weekly, a highly-regarded industry newsletter, has reported that total oil demand was off 1-million b/d in six western industrial nations in April. It found U.S. demand off 3% that same month.

If demand is falling again, this could play havoc with already weak world crude oil prices and possibly trigger a new wave of oil company mergers. Saudi Arabia's oil minister, Ahmed Zaki Yamani, has warned that world prices could drop below $20 bbl. Some analysts say that if it does, some companies which have taken on a lot of debt to avoid takeovers would be in trouble.

Jobber Fallout to Continue . . . How Many Will be Left?

What Different Groups Predict:

Years from now	Marketers Number/Fallout	Refiners Number/Fallout	Assn. Executives Number/Fallout	Industry Observers Number/Fallout
2	10,705/11%	10,636/10.5%	10,700/11%	9,933/17.2%
5	8,905/26%	9,685/19.3%	9,311/22.4%	8,313/30.6%
10	7,811/35%	8,972/25.3%	8,277/31.1%	7,072/41.1%

Source: Petroleum Marketers Assoc. of America.

Even if crude prices stabilize at their present levels of around $26 to $28 bbl., most industry and financial analysts believe the large oil companies will continue trying to pare their refining and marketing operations. John C. Sawhill, former deputy secretary of energy and now a director of New York consulting firm McKinsey & Co., claims the oil companies lost approximately $6-billion downstream over the past two years.

Faced with the record plunge in demand and bleak forecasts for the future, most of the oil companies have been sharply reducing or eliminating many jobber benefits which the jobber once thought to be "normal business practices."

Double-Whammy

The sharp reduction or loss of these benefits has happened gradually over the past four-and-a-half years while one of the worst dog-and-cat fights ever seen has been going on at retail.

Many jobbers say that, in effect, they have been hit with a double-whammy. On the one hand, their suppliers have been taking away benefits which had traditionally helped them survive such competition. On the other hand, they say, they find that their suppliers now are often their toughest competition at the pumps.

Prior to decontrol, most refiner-suppliers sold gasoline to their jobbers at a discount off their dealer tankwagon (DTW) prices. In most cases, the jobber paid 3.5¢ to 4¢ gal. less than the DTW price paid by dealers.

In addition, most companies gave the jobber a freight allowance to cover the cost of hauling product from company terminals to the jobber's place of business. On the average, say jobbers, this allowance ranged from 1¢ to 1.5¢ gal.

But since decontrol, the majority of companies have switched to rack or terminal pricing for their jobbers. Some companies now maintain they have two pricing structures, one for jobbers and one for dealers, and their selling prices for each depends on what competition is doing.

Many jobbers claim the net effect of these changes has been a sharp reduction and even elimination of both their traditional "functional discount" jobber margin and their freight allowances.

The jobber also has lost other traditional benefits such as free credit cards and long credit terms.

When all of the lost benefits are added up, some sources say a jobber may be receiving as much as 8¢ or 9¢ gal. less in total margin and other benefits today than he was getting before decontrol.

"The companies have been playing 'take-away' on all those goodies the jobber once got until the drawers are getting too tight to dance in," says Jack Malone, a Memphis multi-brand jobber.

In Texas, where TOMA has launched a campaign to call shareholder and oil company chief executive attention to what it alleges to be downstream subsidization of below-cost selling at retail by some majors, the group's president Gary says many jobbers have lost at least 3.5¢ to 5¢ gal. in the "take-away" game.

In addition, says Gary, jobbers in large cities and in markets around them have pretty much lost the traditional 3.5¢ to 4¢ gal. "functional discount" jobber margin. Jobbers in such markets often find, says Gary, that company-supplied dealers are posting prices on their retail pumps close to the jobber buying price.

Jobbers in other states have been striking back too, usually threatening some type of divestiture or below-cost legislation aimed at lessening major company competition at retail.

Supplier Response

The oil companies generally respond to jobber complaints about their margins and other benefits losses by saying the record slump in demand and prices is forcing major changes.

J. W. Schutzenhofer, Shell's marketing vice president, replied to TOMA's complaints last April by saying all segments of the industry—refiners, wholesalers and retailers—have to seek "the most cost-effective manner in which to market their products" in the present highly competitive environment.

Gary W. Edwards, vice president of North American marketing for Conoco, wrote TOMA that "Due to the instability of world crude prices, I feel that over the next few years marketers will continue to experience conditions that will require constant examination by dealers, distributors and suppliers as to how we can market our products more efficiently. We all agree that only the most efficient can survive."

George Babikian, senior vice president of marketing for Arco, believes such things as the jobber's functional discount margin now belong to the past much like the low-volume neighborhood service station. He sees the industry moving increasingly toward a one-price system. "The difference between DTW and jobber rack prices will continue to be very minimal," Babikian predicts.

Some jobbers say they can understand that the oil companies, hard-pressed on many fronts, are having to make some changes in their traditional marketing practices.

"We used to operate on the supplier's money," says TOMA's Gary. "They would give us 15 or 20 days, sometimes longer, to pay for the product we bought, plus many other things.

"But you just have to look at what happened to companies like Phillips to see that they have problems, too. All companies have really tightened up their credit terms and we can see reasons for that. The jobber just has to do the same with his customers."

Still, insists Gary and TOMA, some companies are doing things both at retail and in the commercial account field which make it tough for even the most efficient jobber to survive.

The Crunch

Many oil jobbers, just like most oil companies, have had a tough time adjusting to the new world they entered when the federal controls were removed.

In 1979, about the time Arco's Anderson says the oil companies were getting ready for that big party of unlimited demand and a further runup in prices, the jobber's biggest worry was where to find a little extra supply.

Once again, for the second time in five years, there were long lines at service stations. Marketers who could get supply were able to reap fat margins legally. Some who wished to play around in the

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spot market by winking at the government controls could make as much as 30¢ to 40¢ gal.

It was thought the industry was short about 1- to 1.5-million b/d of oil at the time. Some oil company executives fretted about a possible shortage of refining capacity. OPEC, spurred on by the Iranian revolution, was putting world crude oil prices in orbit.

Jobbers, along with almost everyone else in the oil business, were making money hand over fist. One Southeast jobber admitted he was socking away "over $1-million a month" in high-interest-bearing bank accounts.

But then the party was over, and many found that it was time to pay the piper.

By the summer of 1980, demand was shrinking like a $2 shirt in a thunderstorm, and so were the fat margins. Meanwhile, jobbers discovered that the soaring prices of the previous year had more than doubled their inventory costs, and interest rates had soared to 20% to 21%. People were beginning to say they wouldn't be surprised to see jobber fallout.

That was just the beginning of the crunch for jobbers, though. The following year, with the controls gone, the oil companies began stripping away those goodies such as functional discount margins, hauling allowances and the like.

The fallout, a trickle at first, quickly increased.

Blue Sky Days

PMAA has estimated that from the end of 1980 to the end of 1982, the jobber "universe" decreased by more than one-third down to 15,160.

At the beginning of the fallout, it was a good time for a jobber to sell his company if he wanted to do so. Other jobbers were eager to purchase, both for the selling jobber's assets and his supply allocation.

In 1980, while the federal controls were still in place, deals were often closed wherein the buyer paid the fair market value for a selling jobber's assets plus from 3¢ to 5¢ gal. for his supply allocation.

Such "blue sky" values largely disappeared, though, when the controls ended and it became obvious that oversupply rather than short-supply would be the industry's problem.

As the dogfight over a shrinking market stripped margins to the bone, the jobber faced a big decision. Those making a commitment to stay in the fight were building far more expensive and sophisticated retail outlets, sucking up gallonage from older outlets. As one jobber put it at the time: "Everybody has a big decision to make. We all made good money last year. Do we reinvest those profits and hope to hit it big again in three or four years? Or do we pick up our marbles and go home?"

Buyer's Market Emerges

The premiums over the fair market value of a jobber's assets which buyers are willing to pay have become thinner over the past two years. In some instances, the seller finds he can't even get the fair market value.

Most jobbers who have been acquiring other jobber companies since 1983 say that a "buyer's market" has definitely emerged. Increasingly, they find that they can pick and choose.

Nevertheless, each deal is different.

A study of actual jobber company sales done by David M. Nelson of Western Washington Univ. under the sponsorship of the Petroleum Marketing Education Foundation shows that "blue sky" or goodwill was more often paid than not in jobber buyouts from 1981 through 1983.

Nelson found that out of 18 buyout-sellout deals in 1981, some 13 of the sellers received premiums ranging from 0.8¢ to 4.7¢ gal. over their properties' fair market value.

In 1982, eight out of 14 sellers were paid from 0.75¢ to as much as 8¢ gal. over market value. However, three of the remaining six sold below fair market value. One went for only 25% to 33% of such value.

Nelson studied more than 37 actual transactions made in 1983 and discovered that 19 involved premium payments above fair market value ranging anywhere from 0.25¢ to 14¢ gal. Of the remaining 18, five sold below and 13 at fair market value.

Some of the 1983 transactions were described as "distress sales," with one company selling for half its fair market value and another auctioned off at a bankruptcy sale.

The size and location of a jobber company, plus the brand it flies, seems to play an important role in what price a seller can negotiate.

One multi-brand jobbership (Texaco/Mobil/Phillips/private) on the East Coast, operating in rural and small cities of under 50,000, was selling 40-million gal. of gasoline and 6-million gal. of distillates annually when it sold for $9.6-million in late 1983, according to Nelson. The company was supplying 100-plus stations and had from 30% to 40% of the market in its area.

Another jobber company branded Citgo/Mobil in the North Central U.S. had an annual gallonage of more than 6-million in gasoline and 1,677,000 in distillates when it sold for $270,000 last year. Only one service station was included in this sale, however, and the buyer paid a premium of 3¢ gal. on gasoline and 6¢ on distillates.

An East Coast private-brand company selling 30-million gal. of gasoline and 5-million gal. of distillates sold for between $6 and $7-million. Included in this sale were 11 high-volume multi-pump C-stores in a city of over 250,000. The independent sold to a major company for cash.

But another jobbership in the South Central U.S., selling 850,000 gal. of gasoline and 50,000 gal. of distillates in a market of over 50,000 population, sold for $400,000 below market value due to operating deficits.

Actual transactions studied by Nelson indicate that so-called "blue sky" premiums or below market-value sales don't always mean exactly either one.

In one case, an Amoco jobbership doing 4-million gal. annually in the North Central U.S. sold for $250,000 over the estimated fair market value of the firm's assets. This works out to a 6.25¢ gal. premium, says Nelson, but neither the buyer or seller "thought of the sale in those terms."

A 1.5-million-gal. Gulf jobbership in the South Central U.S. was sold in 1982 for only 25% to 33% of its market value. However, says Nelson, "The seller benefited from pricing the land at three times appraised value and the equipment at book value or less. This eliminated any recapture of depreciation making the entire profit a long-term capital gain."

Bargain Seekers

The oil companies are well aware that many of their smaller and even average-size jobbers are being squeezed by the loss of margin and other benefits, plus highly-competitive marketplace conditions. They are urging some to consider becoming associates or sub-jobbers of larger ones [*NPN*—May '85 p42].

Some company executives and larger jobbers say many of the smaller ones may have no alternatives other than to go that route or sell out.

This situation makes it tough for the

jobber who has waited until now to consider selling out. Those who might be willing to consider buying his business are well aware of the predicament he is in and tend to drive tough deals.

One Texas buyer on the jobber acquisition trail says he has looked at several over the past year without finding a single one worth buying. "They don't have anything to sell," he says.

A Southeast jobber who has made some acquisitions since decontrol says he has looked at six more jobberships in recent months but found he was interested in only one. He, too, says that "most don't have anything to sell" and still have "inflated price ideas."

This jobber has discussed the possibility of buying out the one he is interested in at 25% to 42% of the appraised value of the seller's equipment plus maybe 1¢ gal. "blue sky." The selling jobber maintains that his business is worth 7¢ gal. "blue sky."

This same jobber also has negotiated with a 2-million-gal.-a-year jobber in a rural area who wishes to sell out for $750,000. The seller has four owned retail outlets, six leased ones, two bulk plants, equipment, and $90,000 in accounts receivable. In addition to his gasoline business, he has $10,000 in annual TBA sales, plus some lube and bulk oil business. The acquisition-minded jobber says the seller has one or two stations he might want, but not the rest of his business.

Jobbers who look at the properties of others who wish to sell say they often find only older retail outlets with small storage. One buyer who has looked at two jobberships located in a small town says only one location between the two interests him.

In addition to their other problems, all jobbers find their liability insurance rates are skyrocketing. One large jobber learned recently that his "umbrella" insurance coverage premium would be $10,000 for $1-million coverage at renewal time. He had paid $1,279.69 for the same insurance the previous year.

"I think some of these smaller jobbers have discovered this, and it makes them more eager to sell out," says this jobber. "They are not all dumb."

What is the Future?

Many sources, both major company executives and large jobbers, believe hard-pressed smaller ones will increasingly elect to either associate with a larger distributor or sell out.

"I think more are getting more serious about selling," says TOMA's Gary. "I think they will get more realistic about what their businesses are worth in today's market. If they don't, they may have to liquidate."

"Many jobbers are quite surprised to learn the market value of their business is well below what the jobber himself figured," says Jerry Everett, former Northwest Petroleum Assn. executive director. "They run a jobbership for 40 years without really paying attention to what's going on around them and they can't get anywhere near what they're asking."

Another association executive fears that many of his members "will just go out of business."

Just about everybody expects the jobber mergers and sellouts to continue. Those who participated in the PMAA survey believe the jobber population 10 years from now will be down in the range of 7,072 to 8,972.

But those who can stick it out are likely to find business better than ever by then, say some sources.

The possibility of really striking it big continues to exist. One large chain retailer of today started his business in 1968 on a capital investment of $2,500. He now rings up over $500-million in sales per year and is building multi-pump C-stores at the rate of one per month. His name is Truman Arnold, of Texarkana, Texas, who operates under the Road Runner brand.

Coincidentally, another young man with the same last name—Dan Arnold of Loves Park, Ill.—has recently opened a multi-pump C-store, also under the brand Road Runner. Dan Arnold, 27, says he never heard of Truman Arnold but he is excited about striking it rich in the gasoline and convenience food business. He has plans for several more stores.

Most sources who see a good future in oil marketing say it will take the type of "go for it" attitude that both Arnolds have to succeed in the future. **NPN**

Jobbers Caught in the Middle As Majors Squeeze Value from Retail

A gradual erosion of the so-called jobber "functional discount" or margin since deregulation is one of the big reasons why the jobber fallout toll has been rising.

A differential between the dealer buying price and the jobber buying price existed for years in the industry in recognition of the function performed by the jobber.

Typically, a jobber bought gasoline from a refiner, stored it in his bulk plant, and then resold it to dealers who were operating service stations built by the jobber and leased to the dealers. An oil company usually figured this jobber function was worth 4¢ gal.

But then, many jobbers began combining the jobber margin with the dealer margin and salary-operating their retail units. Company-supplied dealers, paying 4¢ gal. more for product than the jobber, have long complained that such a practice is unfair to them.

With deregulation, many oil companies began re-evaluating the cost and payout of the jobber function. Some believed that by culling out many of their low-volume outlets, they could increase rents and volumes at the remaining ones. This, went the general reasoning, reduced the economic value of the jobber channel.

A gasoline marketing study done by Robert N. Fenili and William C. Lane for the American Petroleum Institute points out that, from the refiner's viewpoint, hypothetically it is better for a jobber to own a $200,000 station if it is pumping only 50,000 gal. At that level, it is economically sound for the refiner to pay the jobber 4¢ gal. for his investment function.

But if the refiner can replace that 50,000 gal. station with one pumping 100,000 gal., the jobber's 50,000 gal. unit becomes less valuable to the refiner.

The report also points out that if a company can get a 12% return in rent revenue for one of its outlets valued at $200,000, this cancels out the value of having a jobber own the outlet as far as pure economics are concerned.

Since the majority of companies continue to pursue both higher per-unit rents and per-unit gallonages, the jobber margin is expected to remain under pressure.

Battery 'Feeders' Help Majors Put More 'B' Back Into TBA

Oil companies appear to have halted a steep decline in battery sales through service stations by turning to "feeders" or "battery specialists" to supply and service their dealers.

The companies, as a group, had been losing battery sales at about a 10% annual clip for years. But in 1984, they actually showed a sales increase of 2% over the previous year.

Both oil company TBA men and battery suppliers believe the turnaround is significant.

Batteries are one leg of the three-legged TBA stool—tires, batteries, and accessories. It's doubtful an oil company TBA program could be considered viable without a profitable battery business, so that what happens in batteries is in a sense symptomatic of the success or failure of oil companies in the automotive aftermarket.

Several major oil companies have adopted "feeder" programs to improve service to their resale customers, particularly in helping reduce stocks and eliminate on-shelf battery discharge.

It's a radical departure from the ways oil companies distributed batteries in the past, many with their own warehouses and direct shipment, others with drop shipment by battery manufacturer's.

For the companies that now use feeders, gone are "loaders," sales promotions, quantity discounts, and other devices to load up dealer shelves. Instead, dealers are encouraged to buy no more batteries than they need, in some cases even one at a time.

A lot of bugs have been worked out since feeders were first tried by oil companies three or four years ago, and no doubt further improvements can be made. But as feeder programs have spread from company to company and area to area, the hemorrhage of battery sales has been stanched.

What the Record Shows

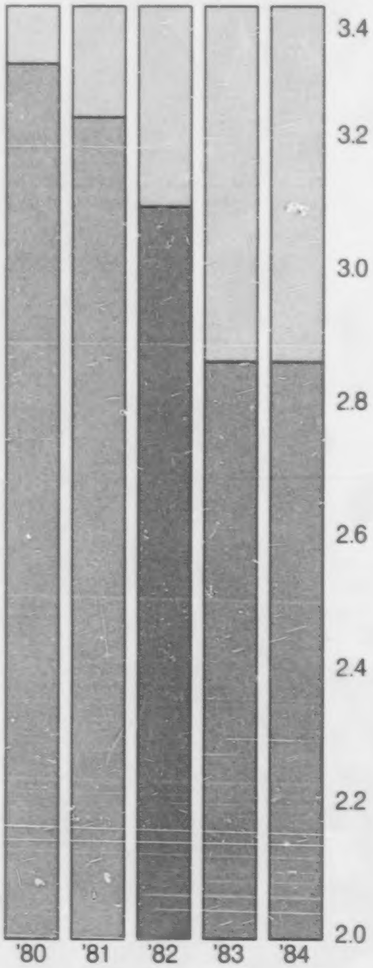
Since 1980, the "gasoline and oil" channel of distribution has lost a third of its battery business. Until last year, the skid was precipitous, amounting to 34% in three years [See chart at right]. Some battery manufacturers and oil companies had begun the countdown to the end of the battery business at service stations.

This wasn't a recent trend. Oil companies had been losing battery sales step by step with station closings and the retreat from automotive service, a process that began in the early 1970s.

By Mark Emond
Contributing Correspondent

There's nothing wrong with the battery business itself [See left-hand chart, page 51]. Sales have grown 19% since 1980, and over 8% in 1984 alone. But most of the recent big increases have been going to automotive chain stores and battery specialists [See table on page 53]. Still very important, too, are department and discount stores and the automotive parts distribution channel.

Battery Shipments to Gasoline/Oil Companies
(millions of units)



While oil companies were losing 33% of their business from 1980 to 1984, battery specialists were gaining 42%. Battery specialists are now the dominant channel of distribution by far [See chart, page 52], and the volume of batteries they handle for oil companies is not included in specialists' sales figures.

"Auto chains and others" are the fastest growing channel [See table on page 53].

With battery specialists going great guns, oil companies evidently decided to copy success. It was a case of "if you can't beat them, join them," says Jerry Lawrie, vice president of GNB (formerly Globe National Batteries), one of the major suppliers of oil companies.

GNB and other manufacturers who do business with the battery specialists got them together with oil companies, and the rest is history. Other battery suppliers mentioned by oil companies as participating in feeder programs are General, Exide, Delco, and East Penn.

Who's Doing What

Nobody seems to know exactly when battery feeding by oil companies started. Various oil companies have at times made arrangements in a limited area with a battery company to handle deliveries and adjustments from its warehouses, which is a kind of feeder operation.

But Shell appears to have led the pack, starting experiments in late 1981 and going national in 1982. Exxon went national last year. Amoco uses feeders in part of its marketing area. Unocal's Eastern Region put its direct retail stations on feeders a couple of years ago and is now doing the same for its jobbers and truck stops. Texaco is reported to have some feeder programs in limited areas.

The function of a feeder is mainly to deliver the batteries, rotate the stock, handle adjustments, and, in some cases, label the product. For this it receives a flat fee for each battery handled, typically $7 but probably ranging from $6 to $8-plus. The fee usually is negotiated between the oil company and the battery manufacturer.

Feeder programs are very similar to one another, although details seem to make some more successful than others. In almost all cases, the oil company signs a contract with the battery company, which in turn deals with individual feeders.

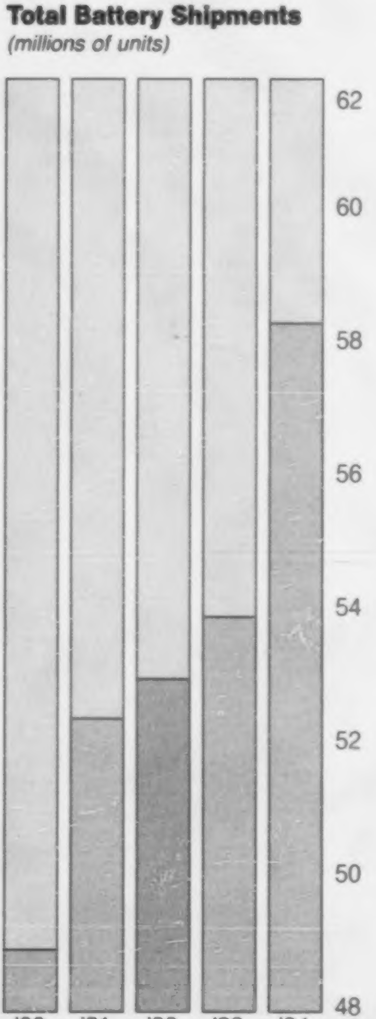
Here is a rundown on the principal feeder programs, with comments by each program manager:

Shell: Biting the Bullet

Shell has 18 feeders covering its entire 38-state marketing area. The company went through a three-year debugging period that called for draconian measures: It amounted to deciding either to get into the battery business right, or get out completely.

Robert Myrick, manager of TBF ("F" for filters), explains the rude awakening:

"We found when we first went into the program that a lot of our batteries were over-age in grade. The way we had sold batteries was on loader deals, just like any other TBF product. That got us into some deep trouble because we were selling more batteries than a dealer could sell in a reasonable amount of time. The result was he ended up with a lot of badly discharged batteries in his inventory.



Total Battery Shipments
(millions of units)

Source: All charts—Battery Council International

"We didn't realize the magnitude of that problem at first. It was soon pointed out to us by the feeders that the problem of sulfated batteries was tremendous. At the urging of the feeders, we eliminated all battery promotional strategy. We went to a new price basis. We eliminated the quantity discount allowances so there would be absolutely no incentive other than just the everyday price for our own sales force or our dealers to want to buy in quantity.

"We designed our program to encourage dealers to buy in the minimum quantities they could. We liked to think about five at a time would be about perfect. That was the initial thought. Today we'll sell as little as one. Dealers just buy batteries off the feeder's truck."

But to get started right, Shell had to bite the bullet. Says Myrick: "In 1983 we bought back the entire inventory of every dealer in the United States in order to purify the inventory and satisfy ourselves that we indeed did start with good stock." He found 80% or more of all the batteries were defective.

"That was a very expensive proposition," he continues, "but we felt it was necessary for the long-term good of the business, and I think we were correct in that assessment. It did us a lot of good in terms of relations with our feeders and our jobbers and dealers."

How does the feeder program affect battery prices? Myrick says he's able to sell at a more competitive price because the cost of promotions isn't built into it, adding that "our price today is probably lower than it was three years ago."

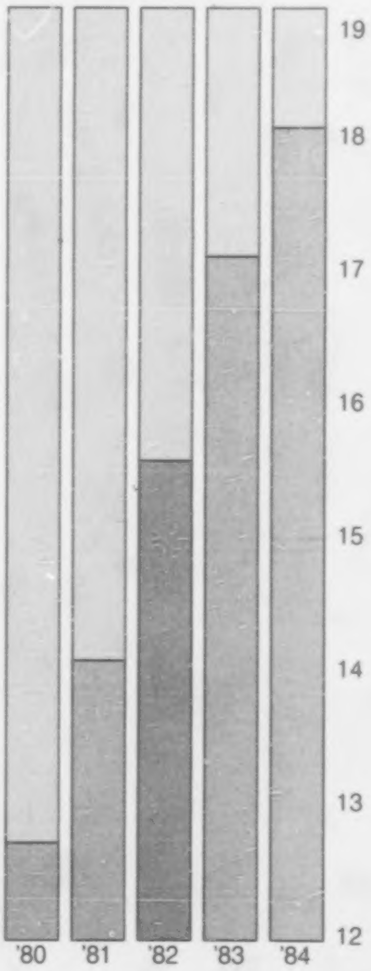
From the standpoint of the dealer, he says the feeder program "has everything that's to the dealer's advantage. He gets local delivery, gets it promptly, gets adjustments handled properly by an expert, gets stock rotation, stock exchange. If I were a dealer I couldn't imagine having a better program."

The feeder program has enabled Shell to get into fine-tuning it wouldn't likely have been able to do before. For example, the company has just completed what it calls "Interstate overlay," a program to try to match the best features of Interstate Battery Systems of America, considered the No. 1 competitor in the business.

"We try to overlay what their system does," explains Myrick. For example, like Interstate, many Shell feeders are now on a prescheduled route system rather than mostly on a demand system.

Because Interstate had a consignment program, Shell adopted one. Shell also attempted to pattern its adjustment procedure after Interstate's "very simple and effective" one.

Summing up, Myrick says: "We're at



Battery Shipments to Battery Specialists
(millions of units)

the point now where we think we understand how to do it. We have excellent battery feeders, and we look forward with great optimism to our battery business in the future."

Exxon: 'It Works'

Exxon is clearly devoted to its feeder program, with about 20 feeders nationwide, but doesn't provide any details about how it works. Monroe Jackson, battery products specialist, says, "I can't divulge exactly how we work our feeder program, because it works."

The program was started experimentally in 1983 in three direct metropolitan markets. By the end of the same year, Exxon decided to go national, completing the process in August 1984.

Discussing the pros and cons of feeder programs, Jackson says they may vary in detail, with some more successful than others, but they are fundamentally good because "you're selling on a sound basis when you're in a feeder program."

The central objective is, "We don't want to overstock our dealers," he says. "I think that's what every good feeder program is based on, selling only the needs. If the dealer needs it, you sell it. If he doesn't, you don't."

Amoco: Taking a Closer Look

Amoco is one of the few remaining major oil companies with its own direct TBA warehousing system, but the company has inaugurated a partial battery feeder program to serve dealers in its outlying marketing areas.

In deciding whether to serve dealers direct or through feeders, "the first thing I think of is distance from my proprietary warehouse," explains Bill Rowles, TBA manager. "If I have a pretty strong market and it's located distant for me to serve, I'll consider a feeder."

Amoco started up in feeder programs about two years ago, and now has eight feeders in such markets as Philadelphia, Atlanta, Milwaukee, and St. Louis.

On the plus side, a feeder program reduces adjustment cost "because there are more frequent deliveries into the station," Rowles explains. "Your feeder cost is the adjustment cost. And, frequent deliveries also mean lower inventory. Shelf life is no longer a problem."

The objective of lowering dealer inventories applies also to the direct operation. "We used to have programs where we'd encourage dealers to stock 250-300 batteries on quantity discounts," Rowles says. "But if you tailor those down and get dealers to buy smaller quantities with some kind of commitment program with smaller discount brackets, you've handled that complaint." He thinks the average dealer's stock of batteries now is down to about 25.

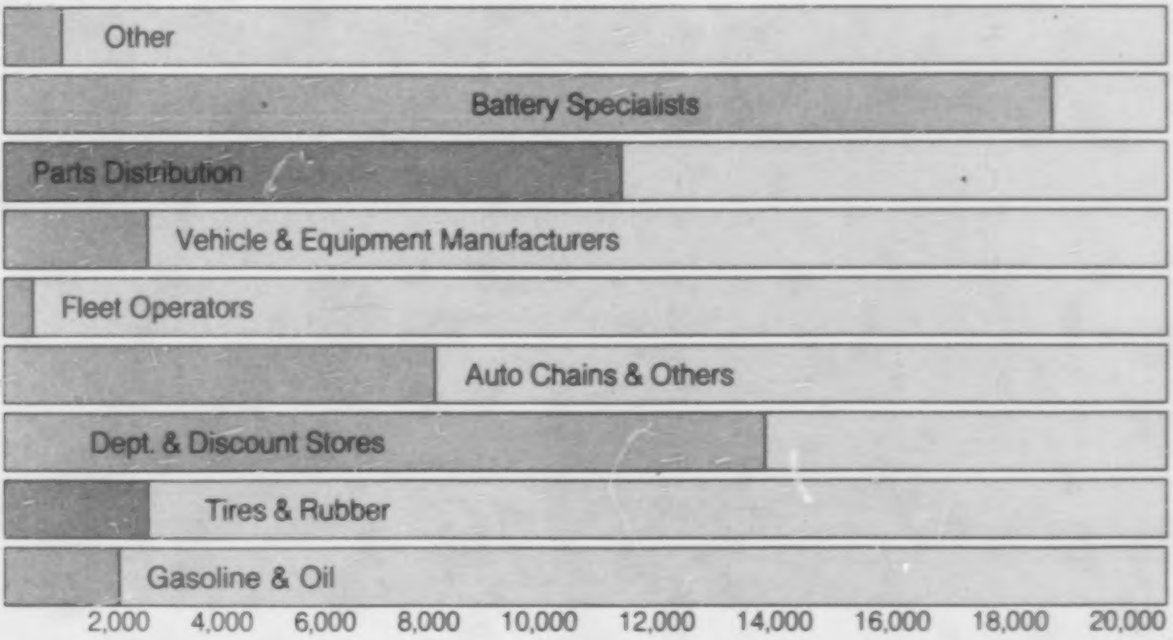
On the minus side, Rowles says, "The one thing I haven't seen, that everybody told me I would see, is increased sales, feeder versus non-feeder markets." Because of this, Amoco called a halt to adding new feeders eight months ago and intends to look closer to see if it wants to go ahead.

One explanation for comparatively weak sales this year is that the battery business is down generally. Battery Council International reports replacement sales off 9% the first four months of 1985 dropping to 16,486,837 from 18,126,460 during the same period last year.

Rowles believes some of Amoco's battery feeders aren't selling aggressively enough. He's trying to encourage feeders to provide incentives to drivers. He's also working to keep feeders better informed about Amoco's battery marketing programs.

"In the meantime, while I'm trying to sort all this out, I'm not expanding feeder marketing anymore," he concludes.

Battery Shipments by Distribution Channel, 1984



Unocal: Feeding Jobbers

Unocal's Eastern Region is in the process of converting entirely to battery feeders after introducing them in its comparatively small direct retail operations a couple of years ago. The company has eight feeders serving jobbers and truckstops now, and will add more until its whole territory is covered.

Most of Unocal's business in the East is through jobbers, and Bill Schultz, manager of product and sales promotion, believes this kind of feeder program is quite a bit different from others.

Shell and others "are using feeder programs in concentrated direct markets," he explains. "That's different from using feeders with jobbers who are scattered out all over the country. You're going to have a lot more feeders, to begin with, because you're covering more geography.

"In addition, there probably won't be as much unit volume for each feeder, though it could vary a great deal."

Shultz says the biggest advantage of feeders is quick delivery in small quantities, which "automatically results in less obsolescence and less aging." A precondition for the success of the program, he says, is dropping loading programs "to prevent aging and sulfating on the shelf and keep the adjustment rate down."

Future of Feeder Programs

Just about everybody considers the key to the strength of feeder programs is that they are fundamentally a sound way of selling batteries through service stations. Battery men recognize, too, that details make the difference between a passable program and a successful one.

Some think feeders are a step backward for oil companies who once served customers with a proprietary warehouse and distribution system. As a practical matter, however, there are only a few such systems left in the oil industry, and perhaps the value of feeder programs must be viewed relatively in that light.

GNB VP Lawrie, who was active in setting up feeder programs for oil companies, doesn't expect miracles. "We could see the trend of battery sales through service stations, and we did something to try to arrest the tide. It has slowed down the decline, but I'd be less than honest if I said oil company TBA is going to rise. What's true for batteries is also true for tires."

Lawrie emphasizes the importance of the quality of the feeder. "The feeder program depends on how good the chosen battery specialist is. Some are very strong. Some are not as financially secure as others. The strength of the program depends on who is conducting the feeding operation."

Shell's Myrick says, "To me, battery feeders are the salvation for the oil company. Just as long as we can have a program that affords everybody acceptable profit—dealer, jobber, oil company, manufacturer, feeder—I think it's definitely the way to go. You've got local businessmen highly service oriented, very much in tune with the needs of a small businessman like a dealer."

Battery specialists have proved their effectiveness by growing to become the dominant channel of battery distribution. To the extent that oil companies use such specialists effectively, their mutual future appears to be bright.

Battery Shipments by Distribution Channel, 1980-1984
(000 Batteries)

	1980	1981	1982	1983	1984	% Change '80-'84	% Change '83-'84
Gasoline & Oil	3,264	3,086	2,722	2,152	2,186	−33.03	1.58
Tires & Rubber	2,188	2,321	2,182	2,652	2,530	15.63	−4.60
Dept. & Discount Stores	12,885	14,396	14,334	13,218	13,099	1.66	−0.90
Auto Chains & Others	4,623	4,925	5,179	5,962	7,492	62.06	25.66
Fleet Operators	288	314	307	347	387	34.38	11.53
Vehicle & Equip. Mfrs.	2,228	2,376	3,098	2,388	2,445	9.74	2.39
Parts Distribution	9,892	9,919	8,814	9,297	10,853	9.71	16.74
Battery Specialists	12,736	14,105	15,651	17,123	18,147	42.49	5.98
Other	737	772	555	541	989	34.19	82.81
Total	48,841	52,215	52,844	53,681	58,129	19.02	8.29

Source: Battery Council International

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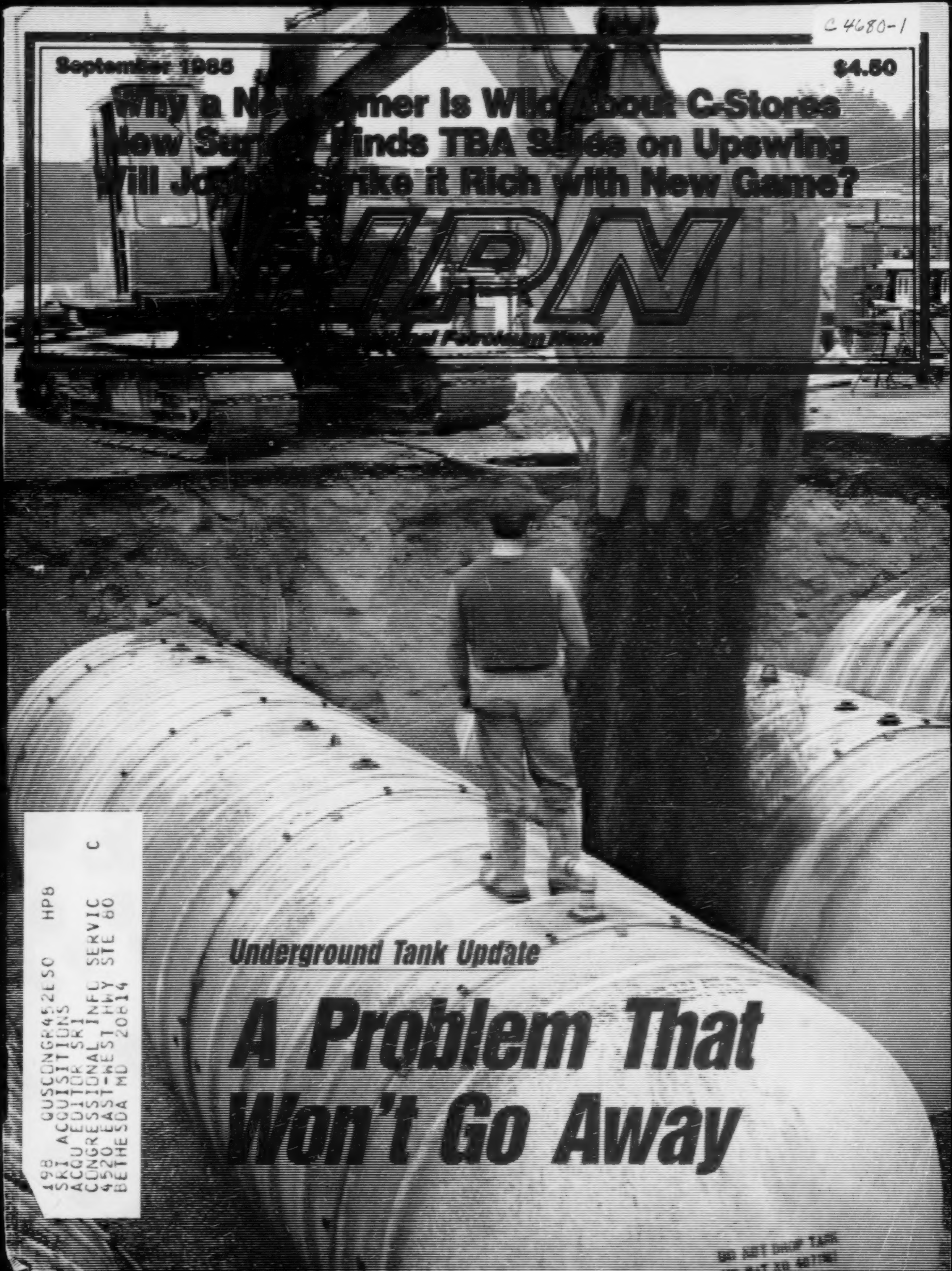
Why a Newcomer is Wild About C-Stores

New Survey Finds TBA Sales on Upswing

Will Jobbers Strike it Rich with New Game?

NPN

National Petroleum News



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Underground Tank Update

A Problem That Won't Go Away

NATIONAL PETROLEUM NEWS

SEPTEMBER 1985 VOL. 77 NO. 9

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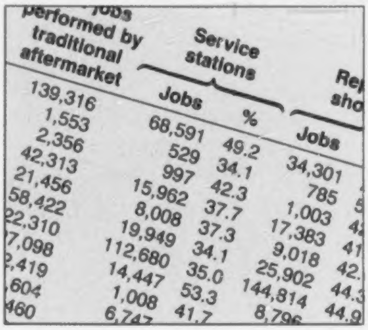
An equipment item that was pretty much buried and forgotten, underground storage tanks threaten to become the biggest equipment headache marketers have ever faced. **Page 31**



performed by traditional aftermarket	Service stations		Re sho
	Jobs	%	Jobs
139,316	68,591	49.2	34,301
1,553	529	34.1	785
2,356	997	42.3	1,003
42,313	15,962	37.7	17,383
21,456	8,008	37.3	9,018
58,422	19,949	34.1	25,902
22,310	112,680	35.0	144,814
7,098	14,447	53.3	8,796
2,419	1,008	41.7	
604	6,747		
460			

After more than a decade of declining market share, TBA sales and automotive service work performed by service stations are showing a remarkable resurgence. **Page 49**

I HIT THE JACKPOT

Retail gasoline marketing, to Arkansas private-brander Bill Copeland, is a fun game that needs a little something new now and then to make it even more exciting. He thinks he has come up with a hot sales promotion gimmick to fill this need —pump-top 'slot machines.' **Page 54**

• TRENDS

DOE-Sponsored Study Says High-Methanol Blends Bring Cost Savings, Octane Boost

At a time when the federal lead phasedown is putting a high premium on octanes, a new report by the Department of Energy indicates that perhaps the easiest and most economical way to increase octanes is by using more methanol than is now considered "normal" in methanol-blend gasolines.

This is not immediately possible, however, because some conditions must first be met, such as the manufacture of higher-compression engines. Moreover, volatility of the tested methanol blends is so high that vapor lock appears inescapable without development of preventative techniques.

Still, the economics and properties of methanol appear to favor greater use of higher-percentage blends over the longer term.

The study was done for DOE by Southwest Research Institute, San Antonio, Texas, and its publication does not necessarily imply government endorsement.

The study does not deal with the methanol blends already permitted under Environmental Protection Agency waivers. Such blends use less than 10% methanol and usually some corrosion inhibitors and cosolvents to resist water separation.

These blends are controversial because some automobile manufacturers and oil companies believe they will damage vehicles not specifically designed for them. Two of the most familiar blends are Arco's Oxinol and United American Fuels' Petrocoal. Their use in the United States is growing.

Neither does the study deal with blends containing 85%-90% methanol, such as is in use in California in a state experimental program.

Rather, the study deals with blends in the range 15% to 90% in the belief there could be economic benefits or that they might be useful for special applications.

Here are some conclusion highlights:

—The blend providing the least cost-per-mile traveled would contain at least 50% methanol and probably less than 80% methanol. Realization of the savings would require a high-compression-ratio engine. The fuel's cost would be about 12% lower than the cost of fuel production for regular gasoline or for using straight methanol in a high-compression-ratio engine.

—Significant savings could be achieved for automobile engines with compression ratios of about 10:1 or 11:1. These are not being used in current models, but were produced until the early 1970s and require premium gasoline. For a 15¢ gal. price differential between regular and premium gasoline, there is a 20% potential savings based on equal energy content. The savings would be achieved by using a blend containing 50% methanol and 50% inexpensive refinery blendstocks.

—For typical current-model automobile engines with compression ratios about 8:1 or 8.5:1 and correctly timed, the use of intermediate-methanol-content blends would provide minor savings. The use of methanol allows a lower fuel cost per gallon, but the cost reduction is nearly matched by the reduced energy content of the methanol blend. Potential savings from using the lower-cost blend components are between 1% and 2% for the 30% and 50% blends.

—Since methanol burns at a lower temperature than hydrocarbon fuels and requires less spark advance, it may be possible to improve fuel economy by varying the timing, and still not exceed nitrogen oxide emissions limits. Decreasing the spark advance by five degrees could improve fuel economy about 3%, and, when combined with the fuel cost savings noted above, an overall 4% to 5% potential savings would be possible.

—The blends containing 50% methanol require only four components and could be produced in a relatively simple refinery. Gasoline could be made without using a reformer or an alkylation unit, and only a small catalytic cracking unit would be required. A refinery designed for high-methanol-content gasoline blends could be simpler and less expensive than refineries designed for straight hydrocarbon gasolines.

The study, "Properties and Economics of Methanol-Gasoline Blends with High Methanol Content," document number DOE/CE/50038-1, was prepared under DOE's "Alternative Fuels Utilization Program."

—Mark Emond

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

JUNE	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.233	$1.153	$1.241	$1.371
Regions:				
Northeast	1.229	1.143	1.220	1.350
North Central	1.242	1.174	1.263	1.394
South	1.212	1.126	1.215	1.360
West	1.257	1.170	1.270	1.409

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	8/2/85	8/3/84
Gasoline	228,860	236,440
Gasoline (Unleaded)*	113,660	106,741
Jet Kerosine	36,327	35,131
Distillates	117,328	125,524
Residual	41,373	50,169

**Included in gasoline total.*
Source: American Petroleum Institute.

Search for New 'Edge' Drives Octane Increases For Leaded, Unleaded

The octane values of leaded and unleaded gasoline rose significantly last winter—tacit recognition in their own way of supplier responsiveness to marketplace pressures for higher-quality motor fuels and competitive "edges" to impress customers.

The latest study by the National Institute for Petroleum and Energy Research, Bartlesville, Okla., says the octane numbers went up three-tenths of a point for both premium-grade unleaded and regular-grade leaded gasolines. Regular-grade unleaded gasolines rose one-tenth of a point.

PREMIUM
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100+
OCTANE
POWER-BOOSTER
GASOLINE

Are 1960s-style octanes coming back as suppliers deal with lead phasedown and high-powered competition?

The study updated the current series through the winter of 1984-85. The institute and its predecessor organizations have been making similar semi-annual studies for the American Petroleum Institute for the past 10 years.

Here are the principle findings compared with the winter of 1983-84:

Gasoline grades	Winter '83-'84	Winter '84-'85
Unleaded 90.0 and above		
Research	96.1	96.4
Motor	86.6	86.8
R+M/2*	91.3	91.6
Unleaded below 90.0		
Research	91.7	91.8
Motor	82.9	82.9
R+M/2*	87.3	87.4
Leaded below 93.0		
Research	92.7	92.8
Motor	84.9	85.2
R+M/2*	88.8	89.1

* Research plus motor method divided by two—the government method for figuring octane values.

Earnings Reflect Restructuring, Few Majors Report First-Half Profits

The high cost of restructuring stands out in bold relief in the second-quarter and first-half earnings reports of at least three oil companies.

Atlantic Richfield and Diamond Shamrock sustained losses of $1.9-billion in the second quarter as a result of their ongoing restructuring moves.

Phillips Petroleum, while it made a profit in the second quarter, implied it could have made perhaps $100-million more if it hadn't been for the high cost of the restructuring forced by the defeated takeover moves of T. Boone Pickens and New York financier Carl Icahn.

Unocal Corp., which fought T. Boone Pickens to a draw in another acquisition attempt, said its second-quarter earnings were down 35%, mostly as a result of the $60-million it spent to preserve its independence. It earned $120-million in the second quarter this year versus $181-million in 1984.

In addition, Exxon reduced its second quarter earnings by $500-million to set up a contingency fund in the wake of a court ruling that it had overcharged its customers more than $2-billion.

In the aggregate, that's close to $3-billion worth of earnings that were written off in second-quarter 1985.

Among the marketing companies that had profitable second quarters were Mobil, Texaco, Amoco, Sun, Amerada Hess, Ashland and Kerr-McGee. Southland, basically a C-store chain but nevertheless one of the biggest independent vendors of gasoline in the land, also had a good second quarter.

Only a handful rang up first-half profits, however. Mobil was up a thin 2%, Ashland a whopping 47% and Southland 24%. Ashland's earnings, however, are for nine months—its fiscal year ends on Sept. 30. The rest generally had minus signs next to their first-half figures.

Arco, which is in the process of withdrawing from the East Coast, said it took a $1.5-billion writeoff in the second quarter to cover discontinued operations and anticipated losses. This resulted in a posted loss of $1.1-billion in the second quarter and $747-million for the first half versus what probably would have been net earnings of $400-million in the quarter and $800-million in the half.

Diamond Shamrock took an $810-million writedown on its assets in its restructuring moves, thus giving it a second-quarter loss of $764-million and a first-half loss of $705-million.

Phillips, hit twice by takeover raiders, said the interest alone on its new $4.5-billion indebtedness amounted to $129-million in the second quarter—money that might otherwise have gone into the earnings column.

Exxon is appealing the $2-billion court decision, but at the same time, it is preparing for the possibility that it may lose, hence the establishment of the contingency fund and the $545-million charge against second-quarter earnings. In all probability, Exxon's second-half earnings also will be tapped for pro rata contributions to the fund.

Company	2nd Qtr. 1985	2nd Qtr. 1984	% Chng.	1st Half 1985	1st Half 1984	% Chng.
Exxon	$745.0	$1,350.0	(44.8)	$2,070.0	$2,825.0	(26.7)
Mobil	411.0	366.0	12.3	731.0	746.0	2.0
Texaco	305.0	302.0	1.0	625.0	623.0	—
Chevron	347.0	380.0	(8.7)	701.0	758.0	(7.5)
Amoco	600.0	524.0	14.5	1,070.0	1,120.0	(4.5)
Shell	337.0	418.0	(19.4)	663.0	743.0	(10.8)
Arco	(1,099.0)	406.0	—	(747.0)	801.0	—
Tenneco	164.0	220.0	(25.5)	227.0	375.0	(39.5)
Sohio	390.0	458.0	(14.8)	733.0	839.0	(12.6)
Phillips	110.0	231.0	(52.4)	216.0	424.0	(49.1)
Sun	146.0	137.0	6.7	273.0	280.0	(2.5)
Unocal	120.4	185.7	(35.2)	301.0	365.8	(17.7)
Amer. Hess	31.8	45.4	30.0	69.0	133.8	(48.4)
Dia. Sham.	(764.0)	64.3	—	(705.0)	123.8	—
Ashland	60.3	36.2	66.6	100.4	68.4	46.8
Kerr-McGee	40.6	38.0	6.8	60.1	78.3	(23.2)
Pennzoil	52.6	51.6	2.0	110.0	120.8	(8.9)
Murphy	23.8	23.6	—	44.0	49.9	(11.8)
Amer. Petrofina	12.9	15.7	(17.8)	10.2	26.0	(60.8)
Southland	88.7	58.5	51.6	89.7	72.5	23.7

(a) Reflects setting up of $545-million contingency fund in overcharge suit.
(b) Reflects $1.5-billion charge for discontinued operations.
(c) Third quarter and nine months, fiscal ends 9/30.

Exclusive Service Job Analysis Shows Station TBA/Repair Revival

After more than a decade of declining market share, TBA sales and automotive service work performed by U.S. service stations are showing a remarkable resurgence.

Battered by successive shock waves in the 1970s and early 1980s—including product shortages, controls, outlet closings and conversions, along with some brutal competition from chain repair outlets and mass merchandisers—conventional retailers apparently are on a roll again in terms of their lucrative TBA and car repair business.

Several of the major oil companies still involved in serious TBA marketing are also seeing more activity in TBA sales. This trend is documented dramatically in Hunter Publishing Company's just-released Service Job Analysis. The SJA is the seventh in a series of triennial studies of the "traditional aftermarket" conducted by Hunter (publisher of *NPN*). As defined in the study, the traditional service market includes service stations with bays, independent repair shops, new car/truck dealer service shops and self-service truck fleet shops.

Data for the SJA was compiled during 1984 and reflects service business done during the year. Information was gathered through Hunter's Micromarket Research Panel composed of about 5,000 members representing all segments of the traditional aftermarket. Panel members were selected to fit the demographic characteristics of each of these markets. Dealers were sampled on a rotating basis over a 12-month period to account for seasonal variations in types of service.

The newest study compiled data on over 350 different service jobs, plus parts, chemicals and accessories sold domestically by approximately 329,000 traditional service outlets. The outlet population in each of these segments is shown in the pie chart on the next page. The SJA does not report on the service business of discount stores, home and auto chains and other non-traditional service outlets.

For service stations, figures from the 1984 SJA are almost uniformly encouraging. Despite the fact that total outlets doing service work continue to shrink (down to 115,000 in 1984 from 120,000 in 1981), share of market, total dollar sales, average per station sales, as well sales volume in many individual job categories are up from the previous SJA reporting period in 1981. Some highlights:

- Total dollar sales of parts, TBA and labor for service stations reached $18.9-billion in 1984, an increase of 45.1% in three years. This percentage increase was the best among all traditional aftermarket segments.
- In 1984, service station share of the traditional market moved up past the 25% mark, the best showing since 1978. The bar chart shows the share-of-market profile over the past five SJA reporting periods for the various market segments.
- The combined dollar volume (parts and labor at retail) for the traditional service dealer market soared to $74.95-billion in 1984, an increase of 39% over 1981.
- Average annual TBA/parts and labor dollar volume per station increased from $108,700 in 1981 to $164,500 in 1984, a surge of 51%—again, the highest percentage growth rate among traditional outlets. Also, the percentage of stations doing over $150,000 in service business rose from 21.7% in 1981 to 38.8% in 1984. Average station service dollar volume has increased 400% since 1972.

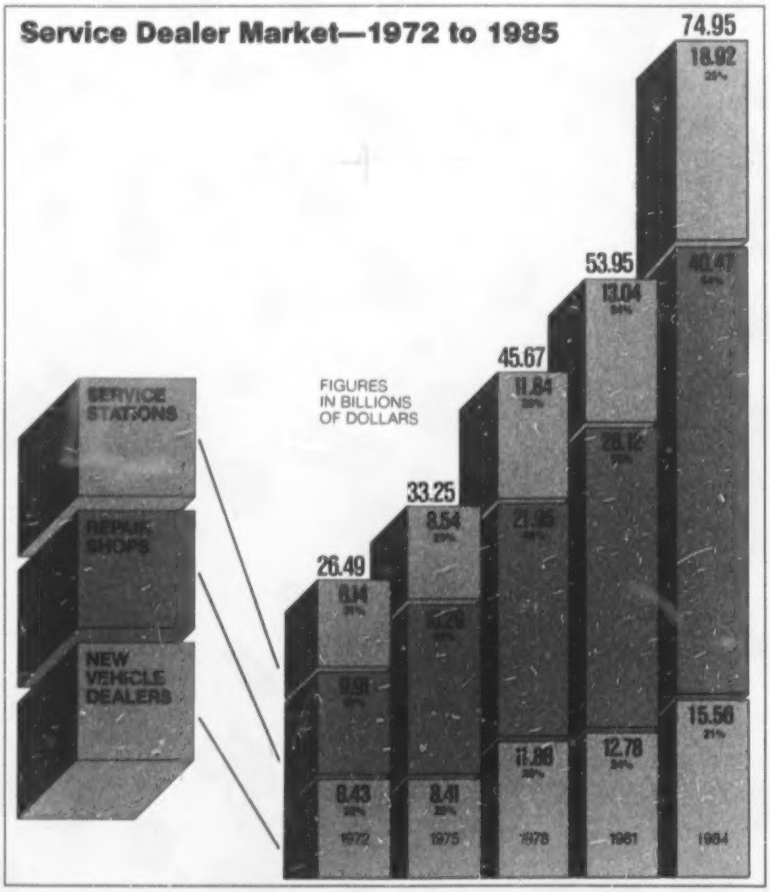
On the Way up

Some impressive increases, along with a few soft spots, are detailed in the 1984 SJA for individual service job categories. This data contradicts the conventional wisdom that traditional stations are fading fast in important service areas.

The table on the next page offers a selection of representative service categories from the 1984 SJA. The first column shows the total jobs performed in 1984 by all segments of the traditional aftermarket. Successive columns show number of jobs by market segment, and the percentage of the total done by each segment.

The table shows that service stations did a big chunk of the business in just about every category listed, in some cases

By Don Smith
Senior Editor


Service Dealer Market—1972 to 1985

the lion's share. For example, service stations have the highest share-of-market for lube jobs, batteries, new and rebuilt alternators, and mufflers and tailpipes among the categories shown. They also did a hefty portion of most other jobs listed in the table.

However, it's in comparing 1984 and 1981 data that the startling comeback of TBA and service sales becomes evident.

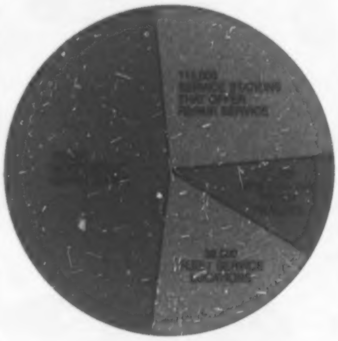
Dealers scored big in battery sales in 1984, installing 14.5-million units for a 53.3% share of the traditional market. This is an increase of almost 4-million units since 1981. Service stations even sold more tires in 1984—26.1-million versus 19.4-million in 1981.

In 1981, stations installed 1.5-million new fuel pumps for 33.8% share of the traditional market. In 1984, stations sold 2.4-million fuel pumps and increased their market share to 42.2%, best on the traditional side. Fuel filter replacements went from 13.5-million and 32.2% share in 1981 to 15.9-million and 37.7% share in 1984.

Dealers did not increase their market share on tune-ups in the three-year period, but jobs performed rose from 15.7-million to 19.9-million. Spark plug sales increased from 95-million to 112.7-million. Replacements of electronic ignition control units almost doubled in the three-year period to 1.9-million. Stations now do about 42% of those jobs.

It's a truism that service stations are blowing away their exhaust business to the chain outlets. However, in 1984 dealers installed almost 1-million more mufflers, 1-million more tailpipes and 400,000 more exhaust pipes than in 1981.

Service Dealer Population—1984



Catalytic converters are beginning to phase into the aftermarket as a replacement item, with 240,000 units installed in 1984 versus only 100,000 in 1981.

As expected, wheels balanced on static-dynamic units are down, but the number performed on the newer computerized balancers has zoomed from 11.6-million in 1981 to 19.9-million in 1984. Stations do 51.5% of these jobs.

Stations are also attracting more alignment business, with 5.2-million front end alignments reported in 1984 (23.5% share) compared to 4.1-million in 1981 (18.6% share). Big-ticket strut replacements are starting to move too, with cartridge replacements tripling to almost 1-million units and strut assemblies increasing nine times to over 500,000.

There's also been a mini-boom in brake work at service stations. Rebuilt master cylinder replacements more than doubled to 1.9-million units in 1984. Brake drums turned or ground went from 6.2-million in 1981 to 9.2-million in 1984. In-shop rotor resurfacing soared from 5.4-million to 9.8-million in 1984.

This growing service activity is confirmed in another Hunter Publishing study conducted in 1984 on service station tool and equipment purchasing. That study revealed that the value of service shop equipment in the average station increased 400% from 1978 to 1984—from $10,723 to $40,731.

On the other hand, the statistical profile for service stations portrayed in the 1984 SJA isn't entirely rosy, especially in such old standby service activities as lubrication, oil changes and motor oil sold.

In 1984, stations did 68.6-million lube jobs (on cars), compared to 63.8-million in 1981. However, their market share declined from 53.4% in 1981 to 49.2% in 1984. Undoubtedly, much of the former lube business is being siphoned off by the quick lube specialists.

The number of oil changes in service

Jobs Performed by Type of Service Outlet—1984

(add 000)

Job Description	Total jobs performed by traditional aftermarket	Service stations		Repair shops		New car/truck dealers		Self-serviced fleets	
		Jobs	%	Jobs	%	Jobs	%	Jobs	%
Lube jobs (car)	139,316	68,591	49.2	34,301	24.6	28,072	20.1	8,352	6.0
Carburetors installed (new)	1,553	529	34.1	785	50.5	134	8.6	105	6.8
Carburetors installed (rebuilt)	2,356	997	42.3	1,003	42.6	153	6.5	203	8.6
Fuel filters replaced	42,313	15,962	37.7	17,363	41.1	8,220	19.4	748	1.8
PCV valves installed	21,456	8,008	37.3	9,018	42.0	3,713	17.3	717	3.3
Engine tune-ups (car)	58,422	19,949	34.1	25,902	44.3	11,162	19.1	1,409	2.4
Spark plugs (new)	322,310	112,680	35.0	144,814	44.9	56,147	17.4	8,669	2.7
Batteries sold	27,030	14,447	53.3	8,796	32.5	2,266	8.4	1,589	5.9
Alternators installed (new)	2,419	1,008	41.7	896	37.0	362	15.0	153	6.3
Alternators installed (rebuilt)	13,604	6,747	49.6	5,311	39.0	884	6.5	662	4.9
Electronic ignition control units replaced	4,460	1,869	41.9	1,922	43.1	498	11.2	171	3.8
V-belts installed	52,987	24,503	47.0	19,683	37.8	5,650	10.8	2,251	4.3
Mufflers replaced (car)	13,793	5,917	42.9	5,704	41.4	1,948	14.1	224	1.6
Tailpipes replaced	12,520	5,446	43.5	5,218	41.7	1,391	11.1	465	3.7
Shock absorbers replaced	25,509	10,270	40.3	12,212	47.9	2,151	8.4	876	3.4
MacPherson struts installed	4,064	948	23.3	2,415	59.4	626	15.4	75	1.8
Drum brake shoes	24,837	9,685	39.0	11,608	46.7	3,135	12.6	409	1.6
Disc brake pad sets replaced (no. wheels)	31,360	11,855	37.8	14,494	46.2	4,567	14.6	444	1.4

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Foods that may help reduce the risk of gastrointestinal and respiratory tract cancer are cabbage, broccoli, brussels sprouts, kohlrabi, cauliflower.

Fruits, vegetables and whole-grain cereals such as oatmeal, bran and wheat may help lower the risk of colorectal cancer.

Foods high in fats, salt- or nitrite-cured foods such as ham, and fish and types of sausages smoked by traditional methods should be eaten in moderation.

Be moderate in consumption of alcohol also.

A good rule of thumb is cut down on fat and don't be fat. Weight reduction may lower cancer risk. Our 12-year study of nearly a million Americans uncovered high cancer risks particularly among people 40% or more overweight.

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stations rose modestly from 68.1-million in 1981 to 71.9-million in 1984. But, again, market share was down from 54.2% to 48.6%. Extended oil change intervals recommended by car manufacturers, along with more do-it-yourself activity, helps explain the relative flatness in this category of service.

Service stations are hurting in motor oil sales. In 1981, dealers sold 574.4-million quarts of oil. In 1984, they sold only 417.9-million quarts, a decline of 25%.

In recent years, there has been a massive shift in motor oil sales away from conventional stations to the non-traditional side of the market—mass merchandisers, chain outlets, etc. At one time, in the early 1970s, service stations handled 70% of motor oil throughout. Now, that share of market is estimated to be about 20%. (Stations, however, still have 50% of the oil sales in the traditional aftermarket).

Many dealers claim they have been priced out of the motor oil market, that they have to pay higher wholesale prices for branded product than their discount house competitors charge for the same brand at retail. The Service Station Dealers of America, charging unfair competition on the part of some major oil companies, has asked the Federal Trade Commission to look into the situation.

At least one company—Exxon—now offers to sell its dealers oil on similar terms as those for discount stores if they purchase in similar quantities.

Per Station Sales Up

The Hunter Service Job Analysis also features a separate breakout on the average number of jobs performed annually by outlets in each market segment, plus the percentage of outlets that perform specific jobs.

A sampling of key jobs tracked in the SJA points to the same growth pattern shown in other SJA data.

In 1981, for example, the average service station that performed tune-ups (88% of stations did this work) tuned 186 vehicles. In 1984, the SJA reports that 90% of stations performed tune-ups and did an average of 192 such jobs.

In 1981, the typical station installed 95 batteries (94% handled batteries). In 1984, the average station (97% performing) sold 130 batteries.

Auto tire sales per station rose from 187 in 1981 to 252 per outlet in 1984. The percentage of stations using computerized wheel balancers in 1984 more than doubled—to 33.7%—over 1981 (15.5%).

Looking at it from another angle, these figures indicate that more than 20,000 conventional service stations made capital investments of several thousand dollars each in computerized alignment equipment in the 1981-84 time frame.

Oil Companies Too

This portrait of a general upswing in TBA and auto service activity is buttressed by reports from oil companies still active in this segment of the market.

"TBA sales are doing real well, for both the company and its dealers," according to a Shell TBA spokesman. Shell's new telemarketing program, following a "successful" test, is now onstream and servicing its 5,100 dealers and 500 jobbers. Working with an outside contractor, Shell is using the program to push its new line of batteries, tires, filters, motor oil, additives, carburetor and choke cleaner, lubricants and brake fluid.

Recognized as the pioneer of the auto care image concept, Shell has been streamlining its TBA program by culling its product line and turning deliveries over to suppliers. Other steps on a market-by-market basis include the use of computers to schedule deliveries and bill customers.

Shell also is pumping new life into its Auto Care program with a "Service Bucks" promotion for Auto Care dealers. Under the program, each purchase of eight gallons of gasoline at an Auto Care outlet entitles the customer to a Service Buck worth one dollar off service labor charges. John Haines, manager—advertising and sales promotion, says, "Not only should this build bay business, it should keep customers coming back to the station for gasoline, since they know they can get a Service Buck."

Shell officials point out that its streamlined approach to TBA marketing has turned that business from a net money loser into one that now covers more than 16% of the company's overall marketing manpower costs.

TBA sales are up for Unocal, too—west of the Mississippi, that is. Unocal eastern division TBA business is described as "flat" by a company marketing official. This simply reflects a divergence in marketing strategies, east and west, he says. The western division stresses the full-service concept built around the company's Protech image program. In the East, the emphasis is on diversified marketing, with convenience stores and volume gasoline operations included in the marketing mix.

C-Store Briefs

C-Store Sales Up, Gasoline Gains Slow

The nation's convenience store industry rode the crest of the U.S. economic recovery last year, posting improved sales and profits, according to the latest State of the Industry report from the National Assn. of Convenience Stores.

The report, based on a survey of NACS member companies, showed 1984 sales for the nation's 57,300 C-stores at $47.5-billion, up 9.7% from 1983 sales of $43.3-billion. Gasoline sales, however, increased only 3.2% to $16.3-billion.

Reflecting a greater emphasis on return on investment, cost control and margins, total industry pre-tax profits crossed the $1-billion threshold for the first time. Last year, profits before taxes were at $1.4-billion, up from $954-million in 1983, the report states. Also, pre-tax profits per store increased a healthy 42% last year to $24,800 from $17,500 in 1983.

Employment in the C-store industry was up 5% over 1983 levels, the report stated. A total 386,000 people were employed in various capacities at the nation's C-stores.

	1984	1983
Sales Total	**$47.5-billion**	**$43.3-billion**
Non-gasoline	$31.2-billion	$27.5-billion
Gasoline	$16.3-billion	$15.8-billion
Sales per store (ex. gasoline)	$544,000	$506,000
Average monthly gallonage per store	42,000	43,000
Pre-tax profits		
Industry	$1,400-million	$954-million
Per store	$24,800	$17,500
Investment per new store		
Urban	$496,200	$450,900
Rural	$356,200	$342,200
Average square footage		
Urban	2,530	2,574
Rural	2,516	2,493

Gross margins per store also returned to "respectable" levels, the report noted. The average gross margin (figured as a percent of sales) rose to 32% in 1984 from 31.5% on non-gasoline sales, and to 6% from 5% on gasoline sales.

Gross sales at the average C-store, excluding gasoline, were $544,000 last year, up 7.5% from 1983.

The industry's focus on profitability was cited as a factor in the slowdown of overall growth in the industry. From the rapid growth days of the 1970s and early-1980s (net growth of 9.9% in 1980), the number of new stores opening in 1984 was up only 5.4% over 1983, the NACS report said. Average investment per new store last year stood at $496,200 for an urban

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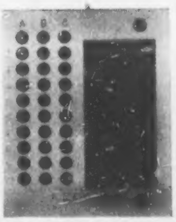
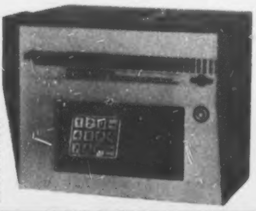

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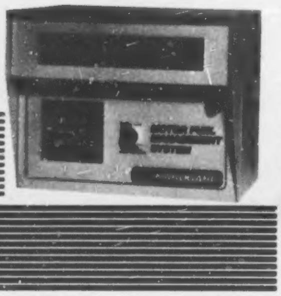

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*Includes relay boxes and connector cable. Does not include installation. Prices for mechanical pumps only.

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site and $356,200 for a rural location—up 10.2% and 4.2% respectively.

The report also cites gasoline margins as being "unpredictable." Average gross margins in 1984 were 6.9¢ gal., up from 5.6¢ gal. the year before. The number of C-stores selling gasoline was about one-half of all C-stores, and the average monthly gallonage at C-stores dipped to 42,000 gallons from 43,000 gal./month in 1983. The report said the average number of hoses per store stood at five, the same as the year before, and that 48% of all stores had canopies.

Branded gasoline sales appeared to be on the rise last year, with 49% of stores selling branded gasoline, compared to 35% in 1983.

Regarding inside sales, tobacco held on to its first-place spot with 18.1% of non-gasoline sales, beer had 13.7% and soft drinks 11.3%.

The NACS study was based on the responses of 131 companies, about 50% of NACS membership. The companies that responded operate 20,535 C-stores across the country.

Fuel Oil Briefs

Pres. Reagan Salutes Oil Heat Centennial

President Reagan, in a tribute to oil heat, said he believes much of the industrial progress of this century "could not have been possible" without it.

His message was one of the highlights of the New England Fuel Institute's centennial celebration in June [*NPN*—Aug. '85, p58].

The President said it gave him great pleasure to extend "warm greetings" to NEFI and the industry on the 100th anniversary of the first technically sound oil burner. Then he added:

"Much of the industrial progress of America in this century would not have been possible without the contributions of oil heat technology and the oil heat industry.

"It is remarkable that, while technological progress in energy during the past 100 years has undergone enormous change, your industry has remained a vital part of our nation's energy distribution system throughout the past century.

"This is due to the spirit and enterprise of the thousands of small businesses that have comprised it for generations. The oil heat industry is a fine example of the inventiveness and flexibility of American free enterprise. On this great occasion, I salute you and wish you another hundred years of progress and success benefitting all of your countrymen."

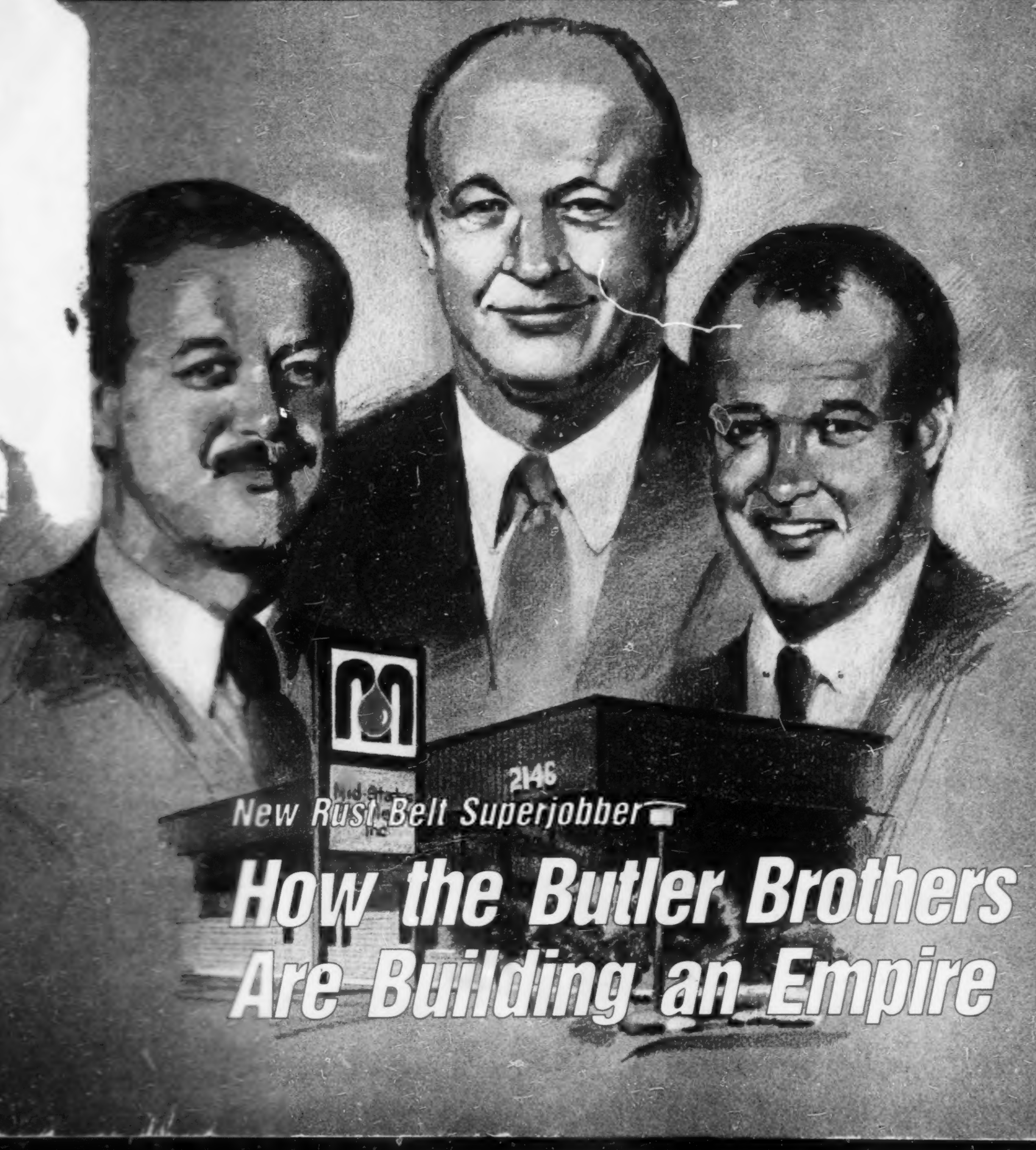
C4680-1

October 1985 $4.50

850,000 b/d of OPEC Product Coming Soon?
Chevron May Follow Arco Out of Northeast
Where Majors Stand on Multi-Station Deals

NPN

National Petroleum News



New Rust Belt Superjobber

How the Butler Brothers Are Building an Empire

NATIONAL PETROLEUM NEWS

OCTOBER 1985 VOL. 77 NO. 10

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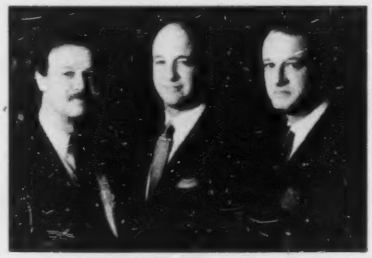
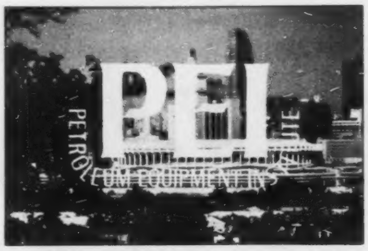


A new breed of superjobber is beginning to emerge as bright young marketers find ways to cope with the changes in the industry. Once a small private-brand jobber, Mid-States Petroleum today is running at the front of the pack under the leadership of the Butler brothers management team. **Page 56**

For a while in the early 1980s, the majors thought multi-station dealers could help them match the explosive changes taking place in gasoline retail marketing. The concept may be losing some of its allure, but many marketers think the majors will keep trying as they struggle to cope with spiraling costs. **Page 62**



The last time PEI held its annual meeting in Cincinnati, a brutal heat wave engulfed the city. This time, PEI distributors and manufacturers will face the heat of underground storage tank and liability insurance problems. **Page 68**

Can OPEC Product Force its Way into U.S.?

Petroleum Industry Research Foundation Inc. (Pirinc) says as much as 850,000 b/d of OPEC gasoline, distillates and other light ends may be looking for homes in U.S. marketplaces within the next two to three years.

On the other hand, New York-based, oil company-supported Pirinc says the OPEC volume may not be that high—perhaps only 385,000 b/d.

Either way, it's a lot of imported product looming on the horizon at a time when industry and legislative circles already are in a tizzy over the 600,000 b/d to 700,000 b/d of product currently coming in from outside.

The 850,000 b/d and 385,000 b/d figures are the high- and low-side projections that Pirinc used recently in an extensive review of world product markets and what's going to happen between now and 1990 as 2.5-million b/d of additional refining capacity comes on-stream in OPEC countries.

Pirinc concedes that some of the OPEC capacity may not be completed by 1990, but says that most of it will be on-stream by 1988. According to Pirinc, 900,000 b/d of new capacity is already in operation. Thus, the critical years are 1985-1988, not necessarily 1984-1990.

Pirinc's study strives hard to be objective. It looks at the four principal marketplaces of the world—the U.S., Western Europe, Japan and Asia-Pacific—in great detail. But it draws no conclusions of its own, and offers no solutions or policy recommendations.

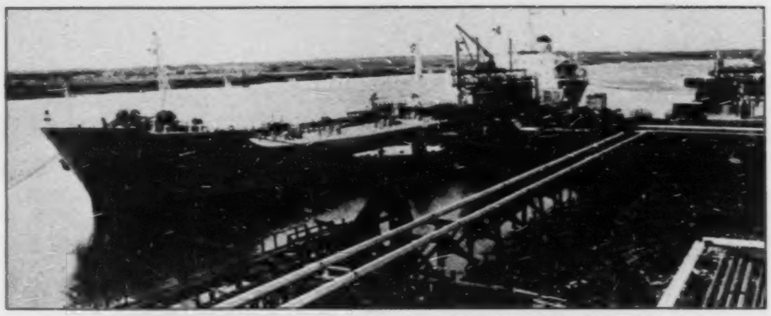
"What we tried to do," says Pirinc president John Lichtblau, "was to provide a framework for rational discussion of the issues and the problems."

Pirinc assumes that the bulk of the OPEC refinery construction program, most of which is in Saudi Arabia, is inevitable and that the member countries soon will have 1.85-million b/d of light product available for export.

It devises two scenarios, one of which assumes that the principal consuming markets will accept *pro rata* "shares" (even though they really don't need a drop more to meet their needs), and the other that assumes that Western Europe and Japan will rebel and take only minimal amounts of the *pro rata* "shares" [See table].

In the so-called low absorption case, the volume of products "available" for U.S. marketplaces would be 850,000 b/d. In the high absorption case, the volume would be 385,000 b/d.

The Pirinc study does not say that the OPEC products will be imported automatically. It simply says they will be "available," indicating it will be up to the U.S. industry itself to determine how much it will bring in.



Upcoming OPEC capacity could push U.S. imports over the 850,000 b/d level.

Pirinc does make two major points, however:

- If the 850,000 b/d level becomes reality, it will place another 1-million b/d of U.S. refining capacity "in jeopardy."

"Much of this capacity is already weakened by the poor refinery economics of recent years and will be adversely impacted by upcoming lead phasedown requirements," the study says. "However, even if actual import levels should be lower, the potential availability of the projected volume of light products would likely have a negative impact on U.S. refinery margins and thus could affect operating decisions."

The U.S. has mothballed, dismantled or shut down 3.5-million b/d of refinery capacity in recent years. Western Europe has shut down 4.5-million b/d at the same time, emphasizing the incongruity of OPEC's determination to expand its own facilities.

- There is reason to fear . . . and believe . . . that OPEC refiners may have cost advantages that are insurmountable and therefore (in substance) be able to flood the world markets with low-cost product.

"The concern of many domestic refiners is that the OPEC export refiners may have inherent, insurmountable, competitive advantages deriving from the refiners' access to their own crude oil and the fact that the market price of crude oil is substantially below the production cost," says the study.

"The OPEC national oil companies are therefore in a position to transfer part of their economic rent on crude oil to their refining sector, either by setting crude transfer prices below market prices or by letting their refineries operate at a loss and maintain their full upstream profit."

Pirinc notes that a recent study by the U.S. International Trade Commission seems to confirm Western suspicions that this strategy already has been adopted to some extent by the OPEC refineries.

The study, in its review of the various global marketplaces, says that Western Europe has indicated it may be willing to take its *pro rata* "share" of the OPEC output, even though it doesn't need it. Japan, on the other hand, administratively opposes such imports now and is considered a good bet to continue that policy. If it does, then Western Europe would be expected to back off and resist too with tariffs and taxes.

The latter would enhance the profitability of the OPEC states to shift their market emphasis from Europe and Japan to the U.S. which, as the study says, doesn't need additional imports either, and has sufficient refining capacity now to take care of the slow growth demand that's anticipated.

The Pirinc study also takes note of the

Where OPEC's Excess May Go

	1984	Low Absorption*	High Absorption*
Total Available	1,020,000 b/d	1,845,000 b/d	1,845,000 b/d
W. Europe	265,000	300,000	500,000
Japan	75,000	175,000	235,000
Asia-Pacific	490,000	525,000	725,000
Subtotal	850,000	995,000	1,460,000
U.S. "share"	170,000	850,000	385,000

*Low assumes Europe and Japan take only minimal increases; high assumes Europe, Japan and Asia-Pacific accept maximum shares.

shift in the source of imported products coming into the U.S. in recent years. It used to be that the Caribbean was a key area, with refineries in Puerto Rico and the Virgin Islands accounting for as much as 60% of imports and other non-U.S. territory islands accounting for 15%. Now these areas are down to 20% and 8% respectively, while Venezuela and Canada have increased their share from 1% to 30%.

Other relatively recent product exporters include Brazil, the United Arab Emirates, Western Europe, Romania and China. The Caribbean still accounts for 43% of the U.S. imports of gasoline and blending stocks while the non-traditional sources are now up to 38%.

Imports from the Caribbean areas are expected to decline even more in the next five years, but it will be interesting to watch whether the OPEC products come in as routine replacements or by elbowing others out of the way.

Players Take Up Sides For Import Fee Battle

The 5,400-member Texas Independent Producers & Royalty Owners Assn. (TIPRO), considered one of the industry's strongest lobbying groups, has endorsed the idea of an import fee on crude oil and refined products.

TIPRO's National Energy Policy Committee says the U.S. bears various hidden costs in maintaining the flow of imported oil and refined products, including spending on military operations to protect shipping lanes.

A U.S. State Department official, E. Allan Wendt, meanwhile, recently wrote American Petroleum Institute president Charles DiBona stating that higher tariffs on crude oil and products would raise the costs of all forms of energy.

The imports issue is expected to come to a head during the current session of Congress.

TIPRO's endorsement of higher fees or tariffs to limit imports adds strength to what was already an impressive lobbying force. Independent refiners earlier this year formed a 35-member coalition for the express purpose of lobbying for measures to halt the growing volume of imports.

Independent oil marketer groups, meanwhile, are lined up on the opposite side of the fence. Both the Society of Independent Gasoline Marketers of America and the Petroleum Marketers Assn. of America are opposed to any limitation of product imports. PMAA, in particular, offered strong testimony against a fee or tariff before a Senate subcommittee this past summer.

Ethanol/Toluene Tariff 'Screwup' Prompts Protests

The U.S. Customs Service found itself in the center of a major controversy in late August over the amount of tariff levies placed on imports of ethanol blended with toluene.

Customs officials had only themselves to blame. It began with a partial exemption granted to six ethanol/toluene importers and ended with a civil lawsuit filed against Customs by a coalition of domestic corn growers and ethanol producers.

In early August, Customs notified the six importers that ethanol/toluene blends would be subject to only a 5% ad valorem duty on the blend, as compared to the usual 3% ad valorem plus 60¢ gal. tariff on imports of straight fuel ethanol.

Bowing to a storm of congressional and administration pressure, Customs did something of an about-face just before Labor Day when it set a Nov. 1 deadline for ethanol/toluene imports under the lower tariff. This however, only made domestic growers and producers angrier. The deadline gave importers a full two months to bring in the ethanol/toluene blend at the lower tariff.

Although the Customs ruling says the incoming blends had to have been contracted for before August 2, one U.S. Congressman said the Nov. 1 deadline gave importers the chance to bring into the U.S. as much as 500-million gal. of the blend. "That's equivalent to the total U.S. production for one year and a potential loss of $1.2-billion in U.S. farm income," Rep. Richard Durbin (D-Ill.) was quoted as saying.

In addition to the lawsuit against Customs, a Washington law firm representing a major ethanol producer wrote to Customs urging the service to revoke the letters sent to the six importers allowing the lower-tariff imports.

Domestic corn growers and ethanol producers were understandably upset with the action taken by Customs. The domestic ethanol market was expected to increase by 15% this year over 1984, according to a recent study by Information Resources Inc., a Washington-based alcohol fuels research firm.

Approximately 6.6-billion gal. of ethanol-blended gasoline (10% ethanol/90% gasoline) will be sold in this country in 1985, compared with 5.7-billion gal. sold last year, says IRI.

Although the domestic ethanol industry has the capacity to produce 858.5-million gal. of ethanol, only about 555-million gal. will be produced domestically, with about 130-million to 150-million gal. of ethanol coming into this country from abroad, particularly from Brazil.

Ethanol is the least expensive method of boosting octane after methanol, which has not gained the widespread acceptance of ethanol. IRI estimates ethanol costs about 70¢ gal. to 80¢ gal. when blended with gasoline when state and federal tax exemptions are considered. MTBE costs about 30¢ to 40¢ gal. more to use, and toluene is about 50¢ gal. more expensive than ethanol, IRI noted.

Methanol, despite strong resistance from a number of automakers, has become increasingly popular in a number of areas. IRI estimates 260-million gal. of methanol/gasoline blends will be sold, up from 248.5-million gal. last year.

41 States Change Blend Regs—More to Come

With the rapid expansion of the domestic alcohol fuels market has come an equally rapid evolution in state and federal regulations covering the industry.

According to a new report on the changes in state regulations for alcohol fuels, 41 states now require pump labeling for alcohol blends. Some labeling laws require that the type and percentage of alcohol be displayed, and others simply require a sign saying that the product contains alcohol. Some states have set limits on the alcohol or oxygen content of all motor fuels, while others specifically limit the amount of methanol that can be blended into gasoline.

The situation can be quite confusing for any marketer who distributes or retails an alcohol blend in more than one state.

"Survey of Federal and State Alcohol Fuel Regulations," compiled by Herman & Associates, a Washington D.C.-based alcohol and energy issues consulting firm, addresses alcohol regulations by the federal government as well as those in all 50 states.

The study looks not only at state regulations for alcohol fuels, but also which states have adopted American Society of Testing and Materials standards for gasoline and which have written their own gasoline specs. Also covered is a survey of all 19 domestic and imported carmakers and their positions on ethanol and methanol blends. While all 19 carmakers approve the use of ethanol blends beginning in the 1986 model year, nine of the companies still recommend against any use of a methanol blend in their products.

The comprehensive look at the current state of alcohol fuel regulations is available for $595 by writing to: Herman & Associates, 2300 M Street N.W., Suite 800, Washington, D.C., 20037.

'85-'86 Price Forecast: No Improvement

Although the outlook is not bleak by any means, the latest forecast by the federal government isn't one that's going to get marketers excited about the balance of 1985 and 1986.

Issued by the Energy Information Administration in mid-August, the revised Short-Term Energy Outlook anticipates a sharp drop in the pump price of gasoline in the second half of this year—perhaps as much as 8¢ gal. from the June 1985 average of $1.22 gal. to a January 1986 average of $1.13 gal.

Horrendous as that may sound, however, it cannot be considered too bad when it is compared with last January's retail prices, which averaged $1.14 gal. Thus, the calendar year drop is only 1¢ gal.

But the projections for 1986 are not of good cheer either. The federal analysts expect gasoline prices to rise no higher than $1.15 or $1.16 gal. in the summer driving months, then level off so that the average for the year is no better than $1.15 gal.

The same sort of dreariness seems to be ahead for the fuel oil marketers too.

Home heating oil is expected to average no better than $1.03 gal. (ex taxes) this winter. At the same time, residual may be setting all sorts of lows this winter and next.

Although the government analysts charitably attributed the depressed gasoline prices in the second half to lower crude oil prices, many others blamed the flood of gasoline imports for the marketplace problems.

Gasoline imports ranged around 500,000 b/d on several occasions this past summer.

Home heating oil prices will average $1.03 gal., while gasoline will fall to a $1.13 gal. average by January, says EIA.

Gasoline demand, after an upward tick this past summer, is expected to average about 6.9-million b/d for the year. That would make it about 1.5% better than 1984. The forecasters aren't overly optimistic about 1986, however, and project that demand will average 6.7-million b/d. That would make it close to 3% under 1985.

An interesting aspect of the projection is the continuing decline in the demand for leaded gasoline. At the end of 1984, leaded gasoline accounted for 41% of the daily demand. It's expected to slip to an average of 35% by the end of this year, and to 25.7% by December 1986.

Since leaded gasoline is scheduled to contain no more than 0.1 grams/gal. of lead after next Jan. 1, the physical difference between leaded and unleaded will be negligible.

Distillate demand is expected to increase in calendar year 1986—more in response to transportation needs than space heating.

Emphasizing how severe the slump has been in the residual fuel area, demand is expected to fall below the 1-million b/d mark in the third quarter of this year and next—traditional periods when it should be accelerating madly instead of going the other way.

	History			Projections							
		1985					1986				
	1984	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Avg.	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Avg.
Prices ($ per gal.)											
Motor Gasoline (a)	1.20	1.14	1.22	1.21	1.18	1.19	1.13	1.15	1.16	1.15	1.15
Distillate Fuel Oil (b)											
Wholesale	0.83	0.80	0.79	0.77	0.77	0.78	0.77	0.76	0.76	0.77	0.77
Retail	1.09	1.05	1.03	1.01	1.02	1.03	1.03	1.01	1.02	1.05	1.03
Residual Fuel Oil (c)	0.69	0.68	0.62	0.59	0.58	0.62	0.55	0.54	0.54	0.55	0.55
Supplies (millions b/d)											
Motor Gasoline											
Leaded	2.71	2.41	2.54	2.36	2.20	2.38	1.98	2.02	1.90	1.74	1.91
Unleaded	3.99	4.09	4.46	4.53	4.54	4.41	4.41	4.88	5.01	5.02	4.83
Total (d)	6.69	6.49	7.00	6.89	6.73	6.78	6.39	6.90	6.92	6.76	6.74
Distillate Fuel Oil	2.84	3.28	2.69	2.54	3.18	2.92	3.34	2.93	2.68	3.32	3.07
Residual Fuel Oil	1.37	1.38	1.09	0.97	1.15	1.14	1.43	1.04	0.96	1.14	1.14

(a) Average for all grades and services, including taxes.
(b) Excludes taxes.
(c) Average, all sulfur contents.
(d) May not total due to rounding off.
Source: Short-Term Energy Outlook, August 1985, Energy Information Administration